



User's Manual

For Macintosh and Windows

SmartMARC v6.0

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Printed April 10th, 2006—v6.0
Printed in the United States of America by

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This product includes cryptographic software written by Eric Young; eay@cryptsoft.com
This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit
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Introduction



Congratulations on selecting **SmartMARC** as your MARC/MicroLIF maintenance and retrieval software. With the power of SmartMARC, users can easily clean and update their library database by searching from a number of different on-line and off-line sources to further complete their bibliographic records.

Although SmartMARC is simple and intuitive, you'll learn its capabilities much faster by reviewing this user's manual, which is divided into chapters that correspond to the program's major areas.

There are three different versions of SmartMARC, **Demo**, **Standard**, and **Professional**. Depending on the version of SmartMARC you are using, bibliographic record information may be searched for, inputted, or updated using one the following methods:

- From imported MARC or MicroLIF records.
- From an Alexandria v5 library collection.
- By scanning UPC barcodes, which are used to perform ISBN searches for the closest matching record.
- Through manual entry of the title, author, ISBN and/or LCCN.

Depending on the version of SmartMARC you are using, SmartMARC can search for complete bibliographic records from some of the following sources:

- Search from a selected Z39.50 database. Public access Z39.50 databases are available all around the world. You can also subscribe to Brodart's own specialized (and other vendors) Z39.50 server¹.
- Search from a **Precision One** CD-ROM database. SmartMARC supports Brodart's Precision One Cataloguing Database², a 2-CD-ROM set that contains over 1.8 million bibliographic records. One CD contains records up to 1991; the second CD contains bibliographic records from 1991 through the present.
- Search from a well-established Alexandria v5 library collection.

Once SmartMARC has located one or more matching records, the results will be displayed with the closest-matches listed first. From this point (depending on your SmartMARC preferences), users can select the closest match and then add their own local holding information. During an "automatic match," the best match is automatically selected (it must have a match score over 100) and local information (if available) can be entered manually before the search or obtained from the import record. Otherwise, SmartMARC will take local information from your program preferences.

1. Brodart's Z39.50 server access is available separately from COMPanion. Contact COMPanion's sales department to order a one year subscription.
2. Brodart's Precision One CD-ROM database is available separately from COMPanion. Order COMPanion part **V5002** for a one year subscription.

Introduction

Depending on the version of SmartMARC you are using, when matching records have been located, they are automatically saved to one of the following locations:

- If you are using SmartMARC in conjunction with Alexandria (COMPanion's library automation software), matched records can be automatically added to a Data Station's database. If a bibliographic record already exists on the Data Station, it will be checked for accuracy and automatically updated to current specifications. If you are retrieving new bibliographic record information, the new records will be automatically saved into your Alexandria database.
- Matched records can be saved in a MARC or MicroLIF file format, which can then be easily imported into any MARC compatible system.
- Records that could not be matched are automatically saved in an "unmatched" record file, which can be later examined for further processing.

Depending on the version of SmartMARC you are using, you also have access to these additional features:

- An activity log that documents all program operations. This log is also saved to the hard drive and can be copied, viewed, and printed.
- You can use SmartMARC to copy Brodart's Precision One Retro-Print CD-ROM (pre-1991 records) to your hard drive so that both CD's can be searched from a machine with only one CD-ROM drive.
- An integrated word processor (VWP) which can be used to examine any TEXT (.txt) import or export file. The **Virtual Word Processor** can be used to open text files of almost any size due to its powerful virtual memory system.
- Program updates over the world wide web. If you are current with your software subscription, you can update to the newest version of SmartMARC over the internet with a single command¹.

1. Internet update requires a full time internet connection

Which version of SmartMARC is right for you?

As previously stated, COMPanion provides three unique versions of SmartMARC, **Demo**, **Standard**, and **Professional**, to better match product functionality with our customer's MARC/MicroLIF maintenance and retrieval requirements. SmartMARC **Demo** and **Standard** can easily be upgraded to SmartMARC **Professional** at any time to provide additional features, including queue searching, auto-matching, and a glut of previously unavailable preferences.

This *User's Manual* will cover all of the features of **Demo**, **Standard** and **Professional**, so that users with any version of the product (or users who have upgraded from **Demo** or **Standard**) will be able to locate essential program definitions and information.

While SmartMARC **Professional** utilizes all of the features and functions described within this *User's Manual*, the **Demo** and **Standard** versions of SmartMARC are actually quite truncated.

The following pages will explain, in detail, all of the major differences between each of the three SmartMARC versions.

SmartMARC Demo

The **Demo** version of SmartMARC allows the user to manually enter bibliographic search information and then save any successful matches in a MicroLIF text file. This version can only be activated from the SmartMARC **Registration** window after the initial program installation (*see page 3 for OSX or page 7 for Windows*). This version of SmartMARC requires no special registration codes, costs, or licenses; it is, in fact, a free, demonstrative, albeit neatly abridged, version of the full program.

The following features will be available (or unavailable) for use in SmartMARC **Demo**:

- SmartMARC Demo has no expiration date.
- The **Registration** window will appear each time the user launches SmartMARC, requiring them to click the **Demo** button in order to launch the demonstrative version.
- Users will only be able to search for bibliographic records from a selected Alexandria database or from a preset Z39.50 server. While users will have no restrictions in viewing the entire default Z39.50 database list, they will be unable to change the preset Z39.50 server no matter if they delete it from the list or rename it something altogether.
- Matched records can only be saved once every *two* minutes. If the user attempts to save before their *two* minutes are up, SmartMARC Demo will display an error message announcing that they will need to wait until their time restriction has expired. However, subscription to a registered version of SmartMARC (i.e., **Standard** or **Professional**) will allow users to bypass these time constraints.
- Although most of SmartMARC **Professional's** menus, selections, and windows will be available for assessment, most of them will be disabled in **Demo** mode. For instance, users will be unable to update the bibliographic records of an Alexandria database, perform any sort of auto-match, or execute any type of queue search. Any attempt to perform these actions will result in an error message.

SmartMARC Standard

The **Standard** version of SmartMARC only allows manual information entry, single searches, and the saving of records in MicroLIF format. SmartMARC **Standard** does not support auto-matching or **Queue** searching.

The following features will (or will not) be available for use in SmartMARC **Standard**:

- The SmartMARC **Single Search** window is the only available search window. Those who would like the **Queue Search** capabilities must upgrade to SmartMARC **Professional**.
- The **Add Record/Add Other** and **Modify Record** windows are available, allowing users to enter more information than they would be able to had they just used the **Single Search** window alone.
- Users are allowed to convert MARC file formats to MicroLIF and vice versa.
- Users will have limited access to a selection of SmartMARC preferences; these include the **Local Info** preferences, **Single Search** preferences, **Set Database** preferences, and **Library Info** preferences.
- SmartMARC **Standard** users will be able to use COMPanion's **Virtual Word Processor** (i.e., VWP) functionality (*documented on page 9*).
- SmartMARC **Standard** users will have access to the program's **Links** menu (*documented on page 8*).
- All of SmartMARC's insightful **Help** documents and **Open Release Notes** will be available for **Standard** users (*documented on page 2*).
- Users who subscribe to SmartMARC **Standard** will also have the ability to email **Tech Support** with any questions, comments, or concerns (*documented on page 2*).
- SmartMARC **Standard** users will be restricted from using the **Start Queue**, **Match Import File**, and **Update Alexandria** functionality.

Installing SmartMARC



This chapter will teach you how to install SmartMARC using easy to follow, step-by-step procedures. The instructions in this chapter assume that you have a basic working knowledge of your computer's operating system.

Before you install SmartMARC, make sure that you have the registration letter that came with your program. This letter contains essential information that is required during the installation process.

Hardware and Operating System Recommendations

SmartMARC has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle differences between the controls at the tops of windows and minor differences in operating system functionality, the program operates identically across both platforms.

Here are the minimal recommended hardware and operating system requirements for SmartMARC:

Recommended Hardware & System Requirements

SmartMARC

Macintosh - MacOS 10.2.8 or higher.
G4 Power PC or better.
1 GB RAM suggested, 512 minimum.
Minimum resolution 1024x 768, 256 colors.
or
PC - Windows 2000, NT, or XP.
Pentium 4 or better.
1 GB RAM suggested, 512 minimum.
Minimum resolution 1024 x 768, 256 colors.

A fixed TCP/IP address is required to communicate with Alexandria v5 and Z39.50 servers.

An internet connection is required for Z39.50 searching and matching capabilities.

A CD-ROM drive is required to use Brodart's Precision One CD-ROM Database and/or installation.

If you have Alexandria installed on the same machine as SmartMARC and plan on having both applications running at the same time, follow the Alexandria hardware and system recommendations.

If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: support@companioncorp.com

If you have a *persistent internet connection* (i.e. you don't have to dial-up to establish a connection) and a personalized return email address, you can send email directly to COMPanion from SmartMARC (see "Library Info" on page 21). To email Technical Support, choose **Tech Support** under the **Apple Menu** on Macintosh, or under the **Help** menu on Windows (see "Tech Support" on page 2 for more information).

Installation Summary (*read this first*)

If one doesn't already exist, the installer will create (or update) an **SmartMARC** folder and extract the SmartMARC program there. Located inside this folder are all the files required to operate SmartMARC.

Detailed below are the general steps required to install SmartMARC. Individualized instructions (depending on your operating system) can be found throughout the remaining sections of this chapter.

- Step 1. On the machine you are going to install SmartMARC, visit COMPanion's website (www.smartmarc.com) and download the latest **SmartMARC Installer**. You can also insert the SmartMARC CD-ROM and double-click on the **SmartMARC** folder. The **SmartMARC Installer** is located inside this folder.
- Step 1. Make sure you have the registration letter that came with your program; this letter contains information required during the installation process. For registration codes or information, contact the COMPanion Sales department at (800)-347-6439.
- Step 2. Once SmartMARC has been installed, double-click on the **SmartMARC** program icon and enter your registration information.

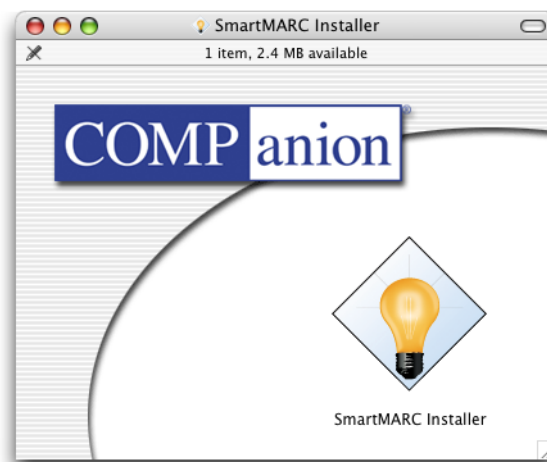
Installing SmartMARC for Macintosh

If you are installing **SmartMARC** on a Macintosh OSX machine for the very first time, please use these easy-to-follow steps.

- Step 1. Insert the COMPanion CD-ROM and double-click on the **SmartMARC v6** Folder. The installers for your operating system will be located inside this folder.

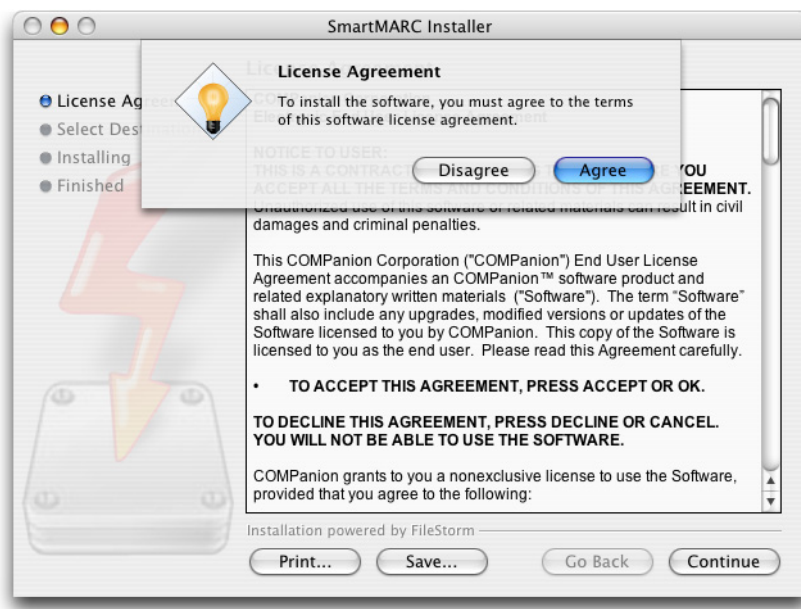
You can also visit COMPanion's web site and download the latest SmartMARC installer (www.smartmarc.com).

- Step 2. Double-click on the file called **SmartMARC Installer.dmg**. Doing this will mount the **SmartMARC Installer** icon on your desktop. When you double-click on the **SmartMARC Installer** icon, the following window will appear.



- Step 3. Double-click on the **SmartMARC Installer** icon located inside this window.

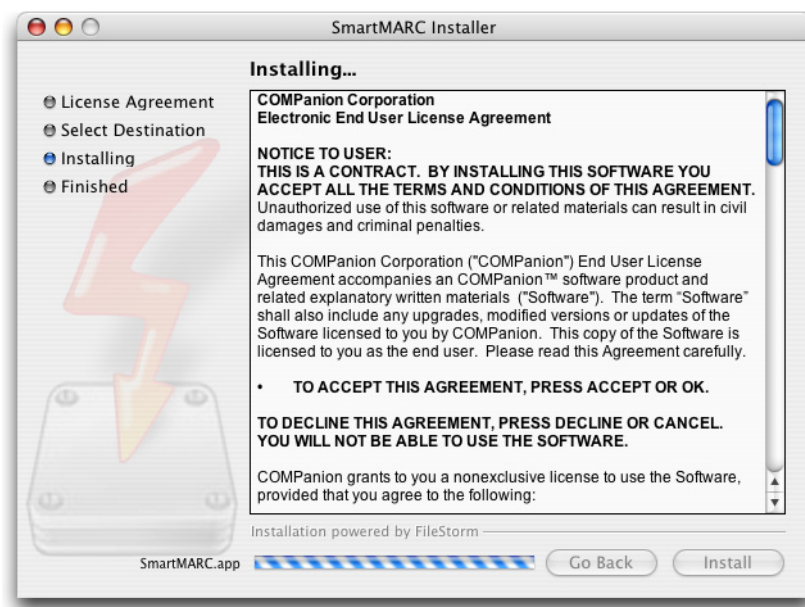
- Step 4. Next, the COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and once you have finished, click on **Continue**. A **License Agreement** drop-down menu will appear. Click on the **Agree** button if you accept the terms of the license. If you do not accept the terms of the license, click the **Disagree** button.



- Step 5. When the following window appears, verify the destination disk where you'd like SmartMARC installed. The default is the hard drive where the currently active System Folder is located. Unless special circumstances apply, this is usually the best location to install SmartMARC. Select the icon of the hard drive so that a green arrow appears above it. Click **Install**.



- Step 6. During installation, the **License Agreement** window will reappear, showing the installation's progress.



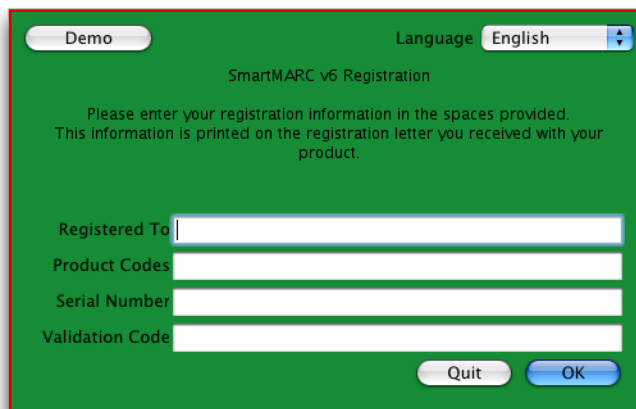
- Step 7. When the installation is complete, a confirmation window will appear. Click **Quit**.



- Step 8. If you installed using a CD-ROM, eject the CD by dragging its icon to the **TrashCan** located on the desktop or the **Eject** icon in your OSX Dock. Store the CD-ROM in a safe place for future use.
- Step 9. Note: The *SmartMARC User's Manual* is included on the SmartMARC CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click on the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there.

If you don't have **Acrobat Reader** installed on your machine, an installer is included inside the **Utilities** folder of your COMPanion CD-ROM or from Adobe's website:
<http://www.adobe.com>

- Step 10. Locate the newly installed **SmartMARC** folder on your hard drive. If you see fit, you may now move the **SmartMARC** folder to an alternative location on your hard drive (this is not recommended). Inside the folder, double-click the **SmartMARC** icon to start the program.
- Step 11. If you have not yet registered SmartMARC, a registration window will appear (described in Step 12). Otherwise, the **Search** window will appear.
- Step 12. The first time you launch SmartMARC, the following registration window will appear. Enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

The image shows a registration window for SmartMARC v6. The window has a green background and a red border. At the top left is a button labeled "Demo". At the top right is a language dropdown menu currently set to "English". The title "SmartMARC v6 Registration" is centered. Below the title, a message reads: "Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product." There are four text input fields labeled "Registered To", "Product Codes", "Serial Number", and "Validation Code". At the bottom right are two buttons: "Quit" and "OK".

You may contact the COMPanion Sales Department for your registration codes.

If you would like to access the evaluative version of SmartMARC, click the **Demo** button. Doing so will automatically open the **Search** window and give you access to a version of SmartMARC with very limited capabilities. For more information on what you *can* or *can not* do using SmartMARC **Demo**, please refer to page 4 of this user's manual.

- Step 13. That's it. You've installed SmartMARC for Macintosh OSX. Now, let's proceed to the **Basics** chapter (*starting on page 1*) and get started!

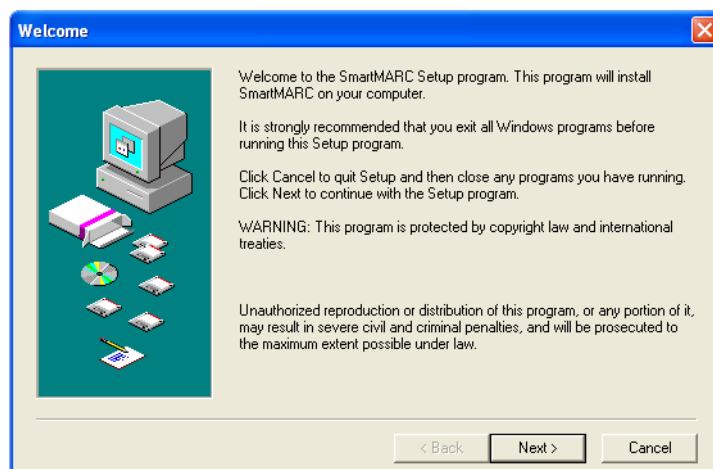
Installing SmartMARC for Windows

Use the following instructions to install SmartMARC on a computer using the Windows operating system.

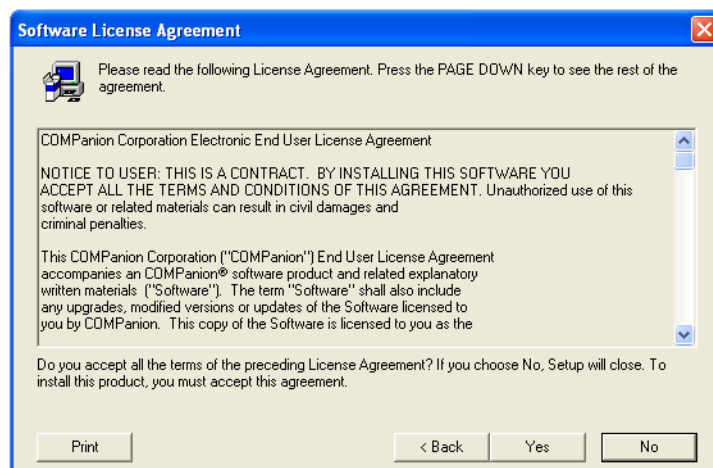
- Step 1. Insert COMPanion's SmartMARC CD-ROM and double-click on the **SmartMARC** folder. The installers for your operating system will be located inside this folder.

You may also visit COMPanion's website and download the latest SmartMARC installer (www.smartmarc.com).

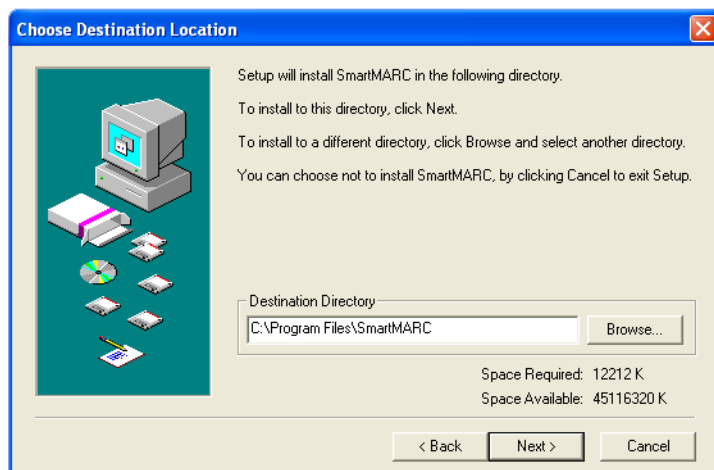
- Step 2. Double-click on the file called **SmartMARC Installer.exe**. When the installer's **Welcome** screen appears, click **Next** to continue.



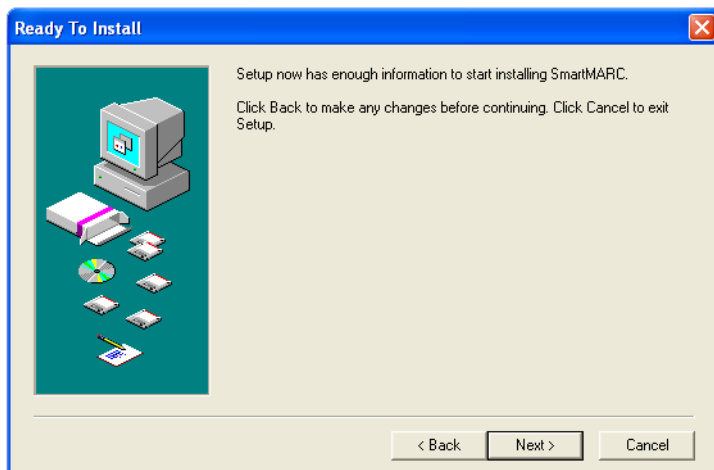
- Step 3. The COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and click the **Yes** button if you accept the terms of the license. If you *do not* accept the terms of the license, click the **No** button.



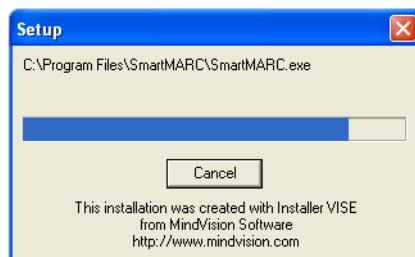
- Step 4. Verify that the **Destination Directory** correctly indicates the location where you want SmartMARC installed. The default is the **Program Files** directory. This is typically the best location to install SmartMARC. Click **Next**.



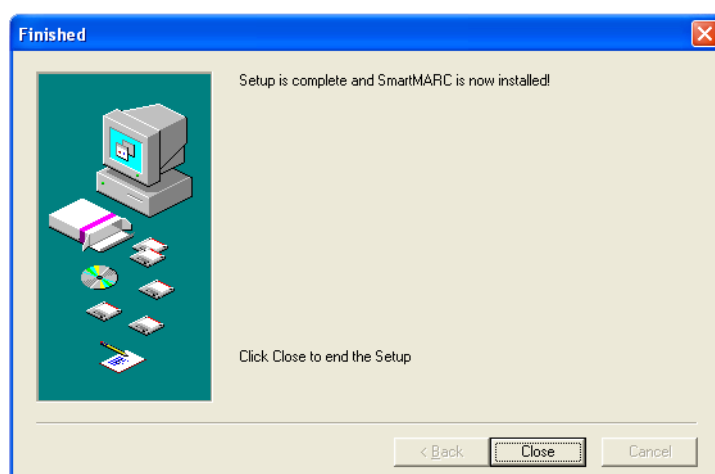
- Step 5. On the **Ready to Install** window, click **Next** to continue.



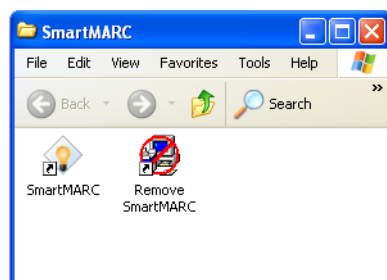
- Step 6. During installation, a window similar to the following shows the installer's progress. To abort the installation, click the **Cancel** button.



When the installation is complete, a confirmation window will appear. Click **Close**.



- Step 7. Eject the CD-ROM and store it in a safe place for future use.
- Step 8. A **SmartMARC** folder is now installed. Below is an example of the window that appears when you install a site license.

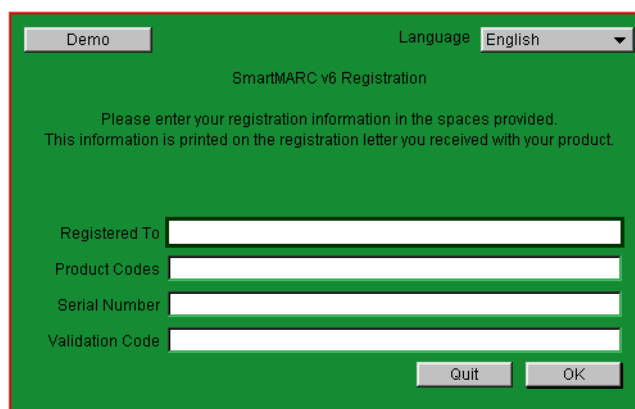


- Step 9. Note: The *SmartMARC User's Manual* is included on the SmartMARC CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click the documentation icon on the CD-ROM or you can copy it to your hard drive and open it there.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of the COMPanion CD-ROM or it can also be downloaded from Adobe's web site:

<http://www.adobe.com/>

- Step 10. The **SmartMARC** folder is now installed in Windows' **Program Files** directory. If it pleases you, you may now move the **SmartMARC** folder to an alternate location on your hard drive (this is not recommended). Inside the **SmartMARC** folder, double-click on the **SmartMARC** icon to launch the program.
- Step 11. Double-click the **SmartMARC** icon to launch the program.
- Step 12. If you have not yet registered SmartMARC, a registration window will appear (described in Step 12). Otherwise, the **Search** window appears.
- Step 13. The first time you launch SmartMARC, the following registration window appears. Enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

The image shows a registration window titled "SmartMARC v6 Registration". At the top left is a "Demo" button, and at the top right is a "Language" dropdown menu set to "English". Below the title bar, the text reads: "Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product." There are four input fields: "Registered To", "Product Codes", "Serial Number", and "Validation Code". At the bottom right are "Quit" and "OK" buttons.

You may also contact the COMPanion Sales Department for your registration codes.

If you would like to access an evaluative version of SmartMARC, click the **Demo** button. Doing so will automatically open the **Search** window and give you access to a version of SmartMARC with limited capabilities. For more information on what you *can* or *can not* do using SmartMARC **Demo**, please refer to page 4 of this user's manual.

- Step 14. That's it. You've installed SmartMARC for Windows. Now, let's proceed to the **Basics** chapter (*starting on page 1*) and get started!

Basics



This chapter describes the menus and basic operational rules used in SmartMARC.

SmartMARC menus will behave according to the operating system standards for both Macintosh and Windows. For example, the **File** and **Edit** menus in SmartMARC are very similar to the **File** and **Edit** menus you may have used in other applications. Additional menus have purposes specifically related to MARC/MicroLIF maintenance and retrieval.

SmartMARC looks and operates similarly on both Macintosh and Windows machines. However, the operating systems *are* different, and there will be some minor dissimilarities between environments. For example, on the Macintosh you press the <command> key for menu shortcuts and in Windows you select the <ctrl> key. Windows and Macintosh also have different controls for minimizing, closing, and resizing windows. In order to keep this user's manual as clear as possible, actions rather than operating system specific commands or controls will more generally be discussed.

Rather than "click the close box at the upper right of your window," this manual will use generalities, such as "close the window," and allow the user to select the commands specific to their operating system.

This manual contains images from both Windows and Macintosh versions of SmartMARC.

Macintosh & Windows Command Differences

Macintosh Command Key	Windows Command Key	Usage
<command>	<ctrl>	Perform Menu shortcuts.
<option>	<ctrl>	Display Tool Tip.
<option>	<alt>	Used to modify commands.

The remaining sections of this chapter will describe the basic operational elements found in SmartMARC.

Help

SmartMARC Help
Download Help Files
Open Release Notes

Help Menu

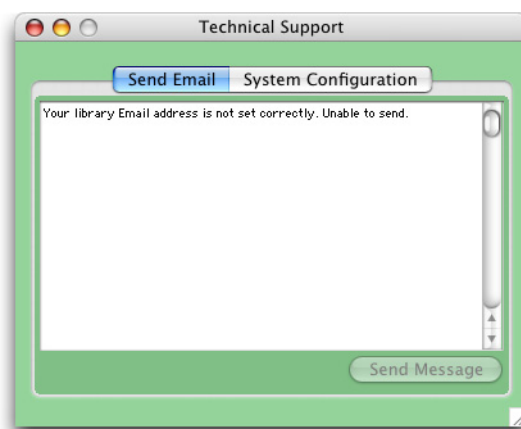
On Macintosh there is a **SmartMARC** menu that contains the **About SmartMARC** and **Tech Support** selections. There is also a **Help** menu that contains **SmartMARC Help**, **Download Help Files**, and **Open Release Notes** selections. On Windows, all these selections are located under the **Help** menu.

About SmartMARC

Shows copyright and version information.

Tech Support

This opens the **Technical Support** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have a personal STMP address configured.



Send Email—If you have an open connection to the internet, you can use the **Send Email** tab to send questions to COMPanion's **Technical Support** team. Describe the nature of the problem that you need help with or a question that you need answered. Click **Send Message** to send the notice directly to: support@companioncorp.com

If you haven't entered a valid email address in your **Library Info** preferences (see "*Library Info*" on page 21), you will not be able to send email to COMPanion's **Technical Support** team. However, SmartMARC won't check to see if this address is valid, so any address that looks legitimate will be accepted. If you are using this technique to fool SmartMARC, don't forget to explain this in your message, and provide accurate return contact information—otherwise COMPanion's **Technical Support** team will respond to your illegitimate email address and you won't receive the help you need.

System Configuration—This tab contains information about your system. This information is automatically attached to your email messages so that our **Technical Support** staff has all the basic information possible to help solve your problems and answer your questions.

SmartMARC Help

This menu selection will open the **Help Index.vwp** document that is located inside your **SmartMARC** folder's **Help** folder. These help documents are kept *constantly* up-to-date by COMPanion's product trainers; you should therefore find them to be accurately rich resources from which to draw very specific program information.

Download Help Files

To retrieve the latest SmartMARC **Help** files, select the **Download Help Files** utility located under the **Help** menu. You may also use the **Get Help Files** utility located under **Check for Updates** (*documented on page 6*).

Open Release Notes

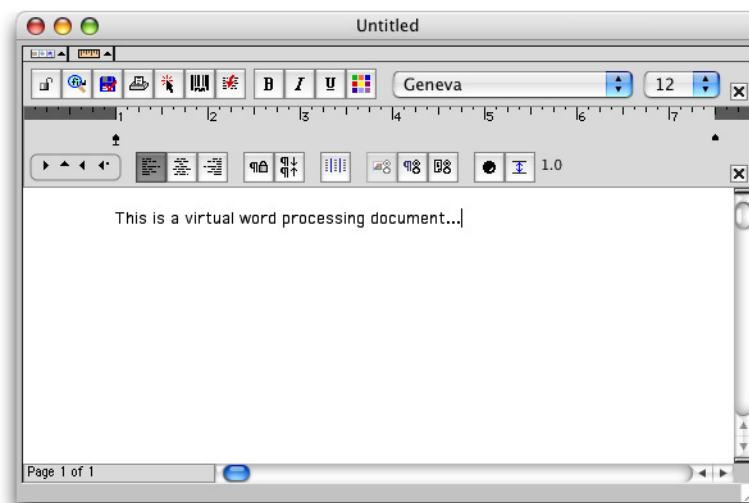
If SmartMARC release notes are available, this selection will display them. Release notes are located in your **SmartMARC** folder and are named **SmartMARC Release Notes.txt**.

File		
New Document	⇧⌘N	
Open	⌘O	
Close Window	⌘W	
Close All	⇧⌘W	
Save	⌘S	
Save As Text		
Save As		
Page Setup		
Print	⌘P	
Restart	⇧⌘E	

File Menu

SmartMARC's **File** menu contains the following selections.

New Document—Opens a new VWP document. VWP stands for **V**irtual **W**ord **P**rocessor, SmartMARC's integrated word processor.



Open—This selection will open a standard operating system explorer window, used to locate files. When you select a document using this window, SmartMARC will try to open it (if it's able). Use this command to open VWP documents, TEXT documents, MARC documents, MicroLIF documents and other such files for viewing.

Close Window—Closes the window that is in focus.

Close All—Closes all SmartMARC windows except for the **Search** window.

Save—If applicable, saves the contents of the window that is in focus.

Save As Text—This command will save the currently visible word processing document in a TEXT file format.

Save As—Allows you to save a .vwp document to a specific location on your hard drive.

Page Setup—A standard operating system function that prepares the page for printing.

Print—This command will print the information contained in the topmost window. For example, if the **SmartMARC MicroLIF.txt** window is open, it will be printed. If the **Single Search** window is on top, then its log is printed.

Restart—Logs the current user out, closes all superfluous windows, restarts the SmartMARC program, and, if **Passwords/Security** is turned on, brings up the login window. If security has not been activated, SmartMARC will restart to the **Circulation** window.

Quit/Exit SmartMARC—Quits the SmartMARC program.

Edit Menu

This menu contains standard operating system editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands that are specific to SmartMARC are included below.

Undo—This command un-does typing or cut and paste operations in individual fields or in the word processor. It does *not* undo operations from other menus, commands and controls.

Redo—An undo for the undo.

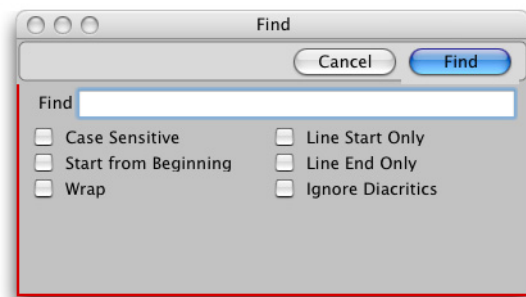
Cut, Copy and Paste—You can cut, copy, and paste text from certain fields into others fields within SmartMARC. For example, you can cut text from a VWP document and paste it into the **Title** field of the **Search** window.

Clear—Clears the selected text, selected field, selected list, or highlighted selection range.

Select All—Selects all the text in the current edit field, current word processor document, or list.

Find—If a VWP document window is open (and has focus), the **Find** command will open the **Find** window which can be used to locate specific information in the virtual word processor document.

Edit		
Undo Cut		⌘Z
Can't Redo		⇧⌘Z
Cut		⌘X
Copy		⌘C
Paste		⌘V
Clear		
Select All		⌘A
Find		⌘F
Find Again		⌘G
Preferences		⌘;



Find Again—Finds the next matching occurrence of text in the word processor.

Paste From File—Allows the user to paste information from a file.

Preferences—This selection opens the **SmartMARC Preferences** window. Preferences are used to customize SmartMARC for your needs (see “*Preferences*” on page 1).

SmartMARC Menu

The **SmartMARC** menu is used to perform SmartMARC specific functions.

SmartMARC	
Match Import File	
Update Alexandria Data	
Convert to MicroLIF	
Convert to MARC	
Start Queue Search Mode	
Search the Queue	
Add Other	⇧⌘A
New Search	⌘N
Check for Updates	
Delete Saved Records	
Check for P1 CD's	
Copy P1 CD to Hard Disk	⌘D

Match Import File—Allows users to import MARC or MicroLIF-format files for automatic matching. Files can also be imported by dragging and dropping them anywhere on the SmartMARC **Search** window. The import files will be automatically matched against the databases that have been chosen in your **Set Database** preferences. Matched records will be automatically saved to the hard drive (depending on your **Single Search** preferences).

The records you are attempting to match *must* be MARC or MicroLIF—the more complete these records are, the more accurately they can be matched.

Update Alexandria Data—Allows users to update all the MARC or MicroLIF records that are contained on an Alexandria v5 Data Station. SmartMARC will automatically update your Alexandria records if and when an accurate match has been made.

This command will use the Alexandria Data Station that is specified in your **Single Search** preferences (see “*Single Search*” on page 5). The **Update Alexandria Data** selection will remain disabled (grayed out) in the **SmartMARC** menu until communications with the specified data station have been established.

Please keep in mind that SmartMARC will *only* update Alexandria v5 records that have not been previously matched via SmartMARC.

To clarify, SmartMARC will examine incoming MARC records prior to matching. If the incoming MARC record contains a 040 tag with any of the following subfields (_a, _c, _d), then the record is skipped.

These 040 tags indicate that the record is either a Webivore record (which SmartMARC does not update) or that SmartMARC has previously updated it.

Below are two examples of the 040 tag:

```
040 _aMWtWR_cMWtWR^ -- Webivore Record
040 _aCCSM5.00_cCCSM5.00^ -- SmartMARC v 5.00 Record
```

- N O T E -

If the **Update Alexandria Data** procedure is going to run for an extended period of time, you should turn off the Alexandria **Archive** feature (see the *Alexandria User's Manual's Archive Preferences Chapter*). During an archive, Alexandria disables all external services. To SmartMARC, this will appear as if the Alexandria Data Station has gone off-line. Therefore, if Alexandria begins an archive during matching, SmartMARC will halt with an error.

Convert to MicroLIF—Select this command if you have a MARC data file whose data structure you would like to convert to MicroLIF.

Convert to MARC—Select this command if you have a MicroLIF data file whose data structure you would like to convert to MARC.

Start Queue Search Mode—When you select this command, SmartMARC begins the **Queue Search Mode**. When SmartMARC is in this mode, all the **Search** queries you enter will be saved to your hard drive so that they can be searched at a later time.

You will know when you are in this mode because the **Search** window will show a **Queue** button located below the **Max Results** drop-down menu rather than the usual **Search** button.

When you have entered all the searches that you require, SmartMARC will save them to your hard drive until you are ready to begin batch-matching.

Search the Queue—To begin searching all the records that have been queued (saved to disk), select **Search the Queue** from the **SmartMARC** menu.

This selection will end the **Queue Search Mode** (if you haven't done so already) and begin batch-matching all the data you've entered into the queue.

Add Other—Brings up the **Add Record** window (see *"Add Record" on page 10*). Use this selection if the item you are cataloguing contains so little information that it isn't worth the time to perform a SmartMARC search.

New Search—Brings the SmartMARC **Search** window into focus, clears it, and places the cursor in the **ISBN** search field.

Check for Updates—Checks COMPanion's Update Server for newer versions of SmartMARC. If an update is available, a window containing the release notes for the newest update will appear so that the user can determine whether they would like to update to the newest version of SmartMARC.

Delete Saved Records—If you select this option, SmartMARC will clear all of the saved matched/unmatched MARC/MicroLIF data files. Thoroughly detailed text files that contain information on these data files can be viewed from under SmartMARC's **Links** drop-down menu.

Check for P1 CD's—This selection tells SmartMARC to re-check for Brodart's Precision One CD-ROMs. This command is useful if you forgot to insert the Precision One CD-ROM before launching SmartMARC.

Copy P1 CD to Hard Disk—Select this command to copy one of Brodart's Precision One CD-ROMs onto your hard drive. You'll need about 700MB of free hard disk space per CD-ROM. In addition to providing access to two CD-ROM databases at the same time, searching for information on the hard drive is *much* faster than searching from the CD-ROM drive.

For more information on copying Brodart CD-ROM's to your hard drive, please review the **Precision One MARC Database** chapter that begins on page 1.

Links Menu

The **Links** menu provides an easy way for users to quickly view the **SmartMARC Log** as well as all matched or unmatched MicroLIF/MARC records and item searches that are being held in your search queue.

When SmartMARC has finished automatically updating and matching the records within an import file, it will automatically create the **SmartMARC MicroLIF/MARC** and **Unmatched MicroLIF/MARC** text files in the **SmartMARC** folder. The information contained within these files can be viewed by selecting the appropriate option from the **Links** menu.

You can choose to view your matched **SmartMARC MARC/MicroLIF** records or your **Unmatched MARC/MicroLIF** records.

If you would like to view the searches that are being stored in your search queue, select **SmartMARC Queue** from the **Links** menu.

Window Menu

As you open new windows in SmartMARC, the **Window** menu will display a list of all currently active windows.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the **Search** window.

When you close a window, it is removed from this menu.

The Virtual Word Processor

Integrated into SmartMARC is a powerful word processor called the Virtual Word Processor (or VWP for short). The VWP uses a highly efficient virtual memory scheme, which allows it to support very large documents in a limited amount of memory.

VWP is available integrated within SmartMARC and as a stand-alone product. VWP is available for both Macintosh and Windows-based operating systems. VWP documents are fully cross platform—a document created on one can be viewed on the other.

The SmartMARC word processor can open HUGE files that many word processors can't. Thus, you can view large import files before you auto-match them. The SmartMARC Virtual Word Processor can provide your institution with a standard cross-platform tool for creating and exchanging reports. All documents are supported across Macintosh and Windows systems.

To create a new word processor document, select **New Document** from the **File** menu.

Since most people are familiar with word processors, Virtual Word Processor's basic operations will not be documented. However, here is an overview of some of the special features available within the Virtual Word Processor.

- Use the icon above the vertical scroll bars to hide/show the word processor tools or show/hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can not be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number.
- Indents, margins, left, right, center and decimal tabs are supported.
- **Left**, **Center**, and **Right** aligned paragraphs are supported.
- **Font**, **Size**, and **Style** controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular- type reports.
- Supports URL links; <cmd>-click on a URL in VWP to open the link in your selected browser.
- Supports internal hot links for URL, VWP links and multi-media display. This capability is only currently available for documents created by SmartMARC. It's mentioned here because it's a valuable capability of Virtual Word Processing that makes using SmartMARC much more enjoyable and powerful.

Preferences



Preferences are used to customize SmartMARC in order to meet your specific MARC cataloguing needs. You can configure SmartMARC to locate and save MARC records one at a time, or in batches. You can also use **Preferences** to select from a variety of searchable databases, specific auto-matching procedures, search settings, and default program values.

The following chapter will detail and describe each preference window and how to use them. Please review this chapter in its entirety before using SmartMARC.

To set up and change SmartMARC preferences, select **Preferences** from the **Edit** menu. The **SmartMARC Preferences** window will appear. Click on the drop-down menu in the upper left corner of the **Preferences** window to view all available preferences.

A screenshot of the SmartMARC Preferences window. The window has a title bar with standard Mac OS window controls (red, yellow, green buttons) and the text "SmartMARC Preferences". Inside the window, there is a "Local Info" section with a dropdown menu and an "OK" button. Below this, there are several text input fields: "Next Barcode" (containing "13000000"), "Library Code", "Location Code", "Funding Source", "Policy Code" (containing "STD"), and "Price". There is also a "MicroLIF Character Set" dropdown menu (set to "Mac Standard (ASCII)"). Below these fields are four unchecked checkboxes with labels: "We are using Follet Interleaved 2 of 5 Barcodes.", "Automatically Install SmartMARC Updates.", "Use Alexandria's Next Barcode when saving directly to database.", and "Call numbers are UPPERCASE.". At the bottom, there is a section titled "Leading Articles" with a list box containing "A", "AN", and "THE".

Edit	
Can't Undo	⌘Z
Can't Redo	⇧⌘Z
Cut	⌘X
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Find	⌘F
Find Again	⌘G
Preferences	⌘,

Preferences Overview

Before you begin using SmartMARC to locate or update your MARC or MicroLIF records, you'll need to configure your SmartMARC **Preferences**.

The decisions that you are required to make can be made much simpler by reviewing the suggestions offered in this six-step overview.

Quickly set up your SmartMARC preferences using these steps.

- Step 1. Configure the general information settings required for automatic matching (*see "Local Info" on page 29*).
- Step 2. Decide how your MARC or MicroLIF records will be saved and other general import options using the **Single Search** preference window (*see "Single Search" on page 31*).

Please note that if you are batch-matching from a file, matched records will *always* be saved to a new file. If you are updating an Alexandria v5 database, matched records will *always* be saved back into that database.

Even if you are primarily planning on performing batch-matches, you may want to conduct a single record search sometime in the future.

- Step 3. Configure your **Auto Match** preferences so that any matched record files are automatically saved in a MicroLIF or MARC format (*see "Auto Match" on page 35*).
- Step 4. Determine the MARC or MicroLIF database that you will be using to match records against.

If you are using Brodart's Precision One CD-ROMs, you may want to initially copy the data to your hard drive (*see "Brodart's Precision One" on page 49*).

If you are going to be using Z39.50 servers (including Brodart's Z39.50 server), choose which Z39.50 database addresses you would like to match against (*see "Set Database" on page 37*).

Once you have decided on one (or all) method(s) of record matching, make sure that they are all properly configured in the **Set Database** preferences (*as documented on page 37*).

- Step 5. Configure your **Library Info** preferences to include your library name, email address, and default language (*see "Library Info" on page 47*).

The remainder of this chapter will detail each of SmartMARC's preference windows in greater detail.

Local Info

Use **Local Info** preferences to insert local holding information into matched MARC or MicroLIF records (i.e. information that is pertinent to your local collection). Setting these defaults will automatically flesh out fields that may have been left empty during the automatic matching process.



The screenshot shows the 'SmartMARC Preferences' window with the 'Local Info' tab selected. The window has a title bar with standard Mac OS buttons. Below the title bar is a tab bar with 'Local Info' and an 'OK' button. The main area contains several text input fields: 'Next Barcode' (with value '13000000'), 'Library Code', 'Location Code', 'Funding Source', 'Policy Code' (with value 'STD'), and 'Price'. Below these is a 'MicroLIF Character Set' dropdown menu set to 'Mac Standard (ASCII)'. There are four unchecked checkboxes: 'We are using Follet Interleaved 2 of 5 Barcodes.', 'Automatically Install SmartMARC Updates.', 'Use Alexandria's Next Barcode when saving directly to database.', and 'Call numbers are UPPERCASE.'. At the bottom is a 'Leading Articles' section with a list box containing 'A', 'AN', and 'THE'.

Next Barcode—Enter the next available record barcode number. SmartMARC will only assign barcodes to matched records if your source data does not contain local information or if you perform a **Single Search**. Defining a default barcode scheme is useful when importing matched records directly into your automated library software (e.g. Alexandria). Default is 13000000.

Library Code—Enter the local library code that you wish to have embedded into your matched MARC or MicroLIF records. If you are using Alexandria, it is beneficial for this field to match Alexandria's **Library Code** field. However, if left blank, Alexandria will assign a code based on preferences (refer to the Alexandria User's Manual). Default is blank.

Location Code—Enter the local location code that you wish to have embedded into your matched MARC or MicroLIF records. Default is blank.

Funding Source—Enter the funding source that you wish to have embedded into your matched MARC or MicroLIF records. This field will identify the local funding source for the new record. Enter the short code for the default policy. Default is blank.

Policy Code—Enter the default policy code that you wish to have embedded into your matched MARC or MicroLIF records. If you are using Alexandria, it is beneficial for this field to match Alexandria's default **Policy Code**. Default is *STD*.

Price—Enter the default item purchase price that you wish to have embedded into your matched MARC or MicroLIF records. Default is blank.

MicroLIF Character Set—This drop-down menu determines the character set of the MicroLIF record being saved to the SmartMARC folder. Please note, if this option is changed while saving multiple records to file, multiple character sets will appear in file.

You may choose between **Mac Standard (ASCII)**, **Windows Standard (ANSI)**, **MARC-8**, or **DOS Standard (ASCII)**.

We are using Follett Interleaved 2 of 5 Barcodes—Check this box if you prefer using Follett barcodes with your automated library software. When this box is checked, you are able to scan Follett barcodes into the **Barcode** field of the **SmartMARC Local Information** window and they will be processed correctly. Default is unchecked.

Automatically Install SmartMARC updates—If this box is checked, SmartMARC will look for a product update upon startup. If a newer version of the program exists, a note will be made to the activity log. You may also download program updates via the **Check for Updates** menu selection (located under the **SmartMARC** drop-down menu). In order for automatic updates to operate correctly, you must have a persistent internet connection. Default is *OFF*.

Use Alexandria's Next Barcode when saving directly to database—Check this box if you are using COMPanion's Alexandria as your automated library software. When this option is selected, SmartMARC will use Alexandria's **Next Available Barcode** preference to help integrate new title records into the Alexandria database. For more information, please review the **Item Management** preference section of the Alexandria User's Manual.

Call numbers are UPPERCASE—If this option is checked, all matched call numbers will be saved into the SmartMARC file as uppercase characters.

Leading Articles—By entering words in the **Leading Articles** fields, users can set certain tag indicators for new titles are saved into the **Add Other** or **Title Editor** window. Click inside this field to place your cursor, provide a word, and press <enter> or <return>. You may enter as many words as you see fit as long as you remember to only add one word per line. Default is *THE*.

Single Search

These preferences determine how SmartMARC performs during and after a search has been initiated. **Single Search** preferences also determine where your matched MARC or MicroLIF data is saved.

Local Info
✓ Single Search
Auto Match
Set Database
Library Info
Miscellaneous

The image shows a screenshot of the 'SmartMARC Preferences' dialog box with the 'Single Search' tab selected. The dialog has a title bar with standard Mac OS window controls. Inside, there's a tabbed interface with 'Single Search' as the active tab. At the top right of the tab is an 'OK' button. Below the tab, the 'Default Maximum Search Hits' is set to 50. The 'Save Records To:' section has three radio buttons: 'File in SmartMARC Folder as MicroLIF.' (selected), 'File in SmartMARC Folder as MARC.', and 'Alexandria v5 Data File at IP Address:' with a text field containing '209.210.70.70'. The 'Char Set:' is 'Mac Standard (ASCII)'. The 'General Import Options' section has two dropdown menus: 'Matching Options' set to 'Always ask me to confirm matches.' and 'Failed Search Action' set to 'Ask Before Saving Record.'. The 'Alexandria Import' section has two dropdown menus: 'Conflicting Barcode Action' set to 'Ask whether to Add or Update.' and 'Title Matching' set to 'Always Add a New Title and Copy.'.

Default Maximum Search Hits—Allows you to specify the maximum number of records that will be returned for each search and then displayed on the SmartMARC Results window. You can select 50, 100, 150, 200, or 250. Default is 50.

Save Records To:

When SmartMARC has finished updating and matching all the records contained within an import file, the updated import file will be saved to the **SmartMARC** folder in a MARC or MicroLIF format depending on the preference you have selected below. If you are updating an Alexandria v5 database, matched records will be saved back into the existing Alexandria database.

File in SmartMARC Folder as MicroLIF—This option will create a text file in the **SmartMARC** folder that contains all matched records in MicroLIF format. This file is called “**SmartMARC MicroLIF.txt**”. During an auto match, records that SmartMARC was unable to match are saved as “**UnmatchedMicroLIF.txt**”. Since MicroLIF records are easier to read than MARC records, **File in SmartMARC Folder as MicroLIF** is the default option.

File in SmartMARC Folder as MARC—This option will create a text file in the **SmartMARC** folder that contains all matched records in MARC format. The name of this file is “**SmartMARC MARC.txt**”. During an auto match, records that SmartMARC was unable to match are saved as a “**UnmatchedMARC.txt**”.

Alexandria v5 Data File at IP Address—Choose this option if you will be saving updated records into an existing Alexandria v5 database. You'll need to provide the IP address of the Data Station (currently running) in the provided field in order for this option to become active. If the IP address of the data station was entered incorrectly or isn't running, you'll get an error message every time you try to save an updated record.

The data station IP address you enter in this preference window is also the one that makes active the **Update Alexandria Data** command from the **SmartMARC** drop-down menu.

General Import Options

Matching Options

Automatically use the best match—If a matching record is located, SmartMARC will automatically select the highest scoring match and open the **SmartMARC Local Information** window (see “How does SmartMARC score records?” on page 77).

Ask me unless there is only one match—If there is only one match found for a particular record (and its score is high enough), SmartMARC will automatically select this record and then open the **SmartMARC Local Information** window. Otherwise the **SmartMARC Results** window open. This is the default selection.

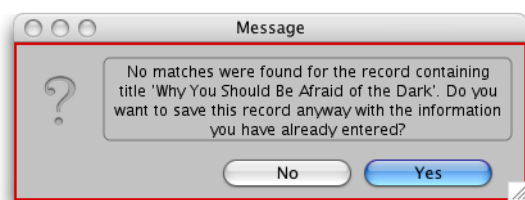
Always ask me to confirm matches—The **SmartMARC Results** window will appear every time a matching record is located.

Automatically use the best match.
Ask me unless there is only one match.
☒ Always ask me to confirm matches.

☒ Ask whether to Add or Update.
Automatically Change Barcode.
Automatically Update the Existing Title and Copy.

Failed Search Action

Ask Before Saving Record—When a search fails, SmartMARC will ask the user if they would like to manually save what little information they have already entered for this record. Click the **Yes** button to save the partial record or **No** to discard it. **Yes** is the default selection.



Automatically Save Record—When a bibliographic record search fails, SmartMARC will automatically open the **Add Record** window. Users will then be able to manually complete a bibliographic record by providing information in the blank fields. After which, the record can then be saved.

Do Nothing—When a bibliographic record search fails, the user is not given an opportunity to manually add or save partial record information, but a warning message will appear, informing the user that no matches were found. Clicking the **Cancel** button in this window returns you to the **Single Search** window so you can modify your search criteria.

Automatically use the best match.
Ask me unless there is only one match.
☒ Always ask me to confirm matches.

Alexandria Import Options

The following options only apply to those who are using SmartMARC in conjunction with Alexandria, COMPanion's automated library software. If you don't have the **Alexandria v5 Data File at IP Address** box checked (and an IP address specified) in the **Single Search** preference window, these options will be unavailable and appear as grayed-out.

Conflicting Barcode Action

Ask Whether to Add or Update—If an item barcode already exists in your Alexandria v5 database, this option will ask the user to either **Add** a new title record (creating an entirely new barcode) or **Update** the current title record information (keeping the existing barcode).

Automatically Change Barcode—When this option is selected, if a duplicate or conflicting barcode is entered, SmartMARC will automatically create a new Alexandria title record and new barcode.

Automatically Update Existing Title and Copy—When this option is selected, if a duplicate title or conflicting barcode is entered, SmartMARC will automatically update these records with any new or missing information.

Title Matching

Always Add New Title and Copy—When this option is selected, all records that are imported into the Alexandria database are given a new title record, adding the correct number of specified copies. Existing records within the Alexandria database will not be touched.

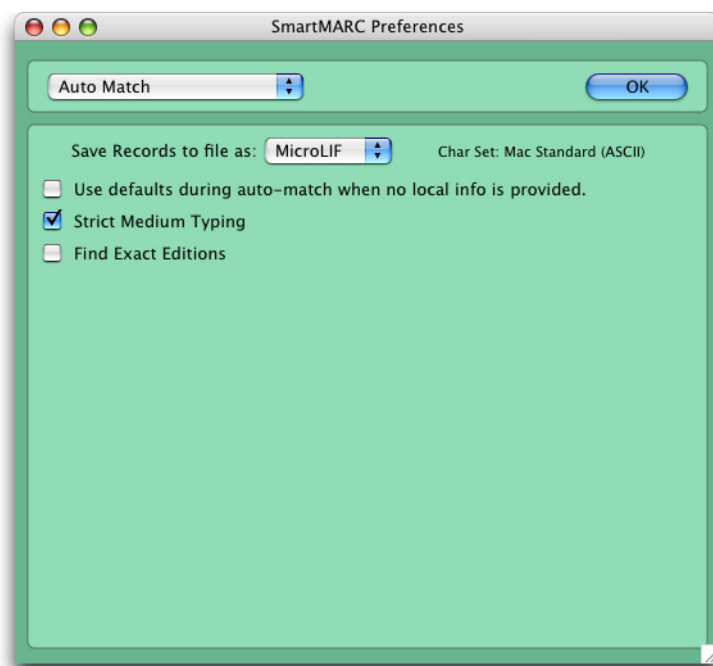
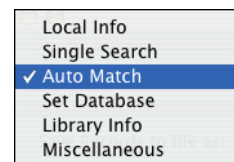
Update Title if it Exists in Database—When this option is selected, if a duplicate title record is imported into the Alexandria database, the existing Alexandria title record will be updated and no new copies will be added.

Update Titles and Add Copy—When this option is selected, if a duplicate title record is imported into the Alexandria database, the existing Alexandria title record will be updated (if needed) and a copy will then be added.

☒ Ask whether to Add or Update.
Automatically Change Barcode.
Automatically Update the Existing Title and Copy.

Auto Match

This preference allows you to configure how bibliographic records are saved during the automatic matching process.



Save Records to file as:

When SmartMARC begins to automatically update and match the records within an import file, an updated import file will be created in the **SmartMARC** folder in a MARC or MicroLIF format (depending on the preference you have selected below). **SmartMARC** will automatically create the SmartMARC MicroLIF/MARC and **Unmatched** MicroLIF/MARC files in the **SmartMARC** folder if they don't already exist. If they do already exist, new bibliographic records will be added to the existing files.

After SmartMARC has launched, the information contained in these files can be viewed from the **Links** menu and the Transaction Log will display the status of these files (whether they exist or not).

**NOTE:**

Punctuation and capitalization will be ignored for matching purposes.

Keep in mind that if the auto match is cancelled during the matching process, the **SmartMARC** MicroLIF/MARC and **Unmatched** MicroLIF/MARC files will contain the records that SmartMARC searched for prior to cancellation.

MicroLIF—This selection creates a text file in the **SmartMARC** folder, containing all matched records in MicroLIF format. This file is called “SmartMARC MicroLIF.txt”. Records that SmartMARC was unable to match are saved in a text file named “Unmatched MicroLIF.txt”. Since MicroLIF records are easier to read than MARC records, **Save Records to file as MicroLIF** is the default selection.

MARC—This selection creates a text file in the **SmartMARC** folder, containing all matched records in MARC format. The name of this file is “SmartMARC MARC.txt”. Records that SmartMARC was unable to match are saved in a text file named “Unmatched MARC.txt”.

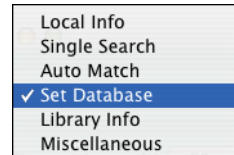
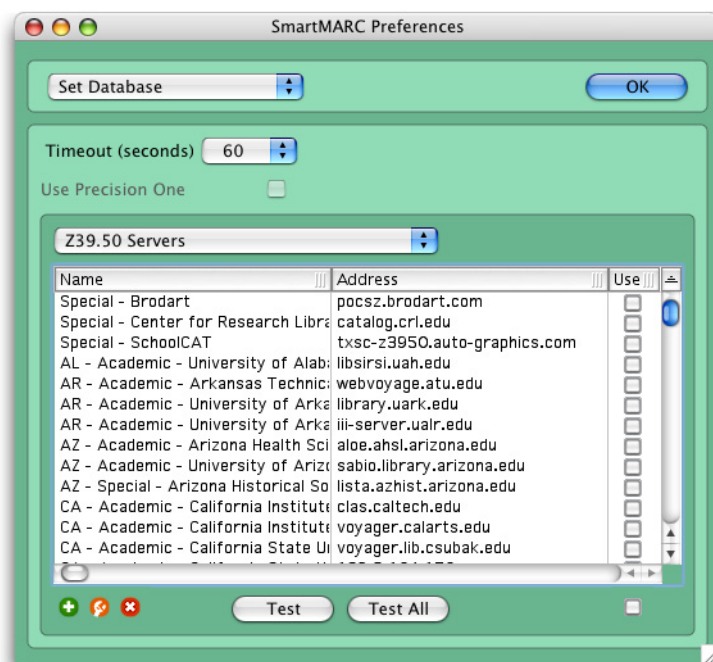
Use Defaults during auto-match when no local info is provided—Check this box if you want SmartMARC to automatically provide local information (from the **Local Info** preference window) during auto-matching. This option will only work if the source record doesn't already contain any local information. Default is **OFF**.

Strict Medium Typing—When this box is checked, SmartMARC will only update records if the **Medium** tag (GMD 245_h) matches the target record. This selection process only occurs if both records have a GMD defined. An unspecified (or blank) GMD will always count as a match.

Find Exact Editions—When this box is checked, SmartMARC will only update records if the **Edition** tag (260_b, 260_c) matches the target record. This selection process only occurs if both records have an **Edition** (**Publisher** and **Year**) defined. An unspecified (or blank) **Edition** will not count as a match.

Set Database

The top section of this preference window allows users to select the sources they would like to search when matching bibliographic records.



SmartMARC will search all of the selected databases when attempting to match records. You may search from the Precision One CD-ROMs, an Alexandria v5 Data Station, and hundreds of different Z39.50 databases.

SmartMARC will search these bibliographic sources in the order that they appear in the **Set Database** preferences (i.e. top-down).

Timeout (seconds)—The **Timeout (seconds)** drop-down menu tells SmartMARC how long it should wait for a response from the Z39.50 server or Alexandria v5 Data Station (during communications) before it assumes that the database isn't available.

Use Precision One—This checkbox will only appear after SmartMARC has detected that Brodart's Precision One CD-ROM database is available. When this box is checked, SmartMARC will first search Brodart's Precision One database when attempting to match bibliographic records. If any of the Precision One CD-ROMs are located on your hard drive or in your CD-ROM drives, SmartMARC will automatically, by default, search them first.

The bottom section of this window allow you to add, edit, and remove **Z39.50 Servers** and **Alexandria Data Station** from a large Z39.50 address book. Please review the following pages for detailed information about these sections.



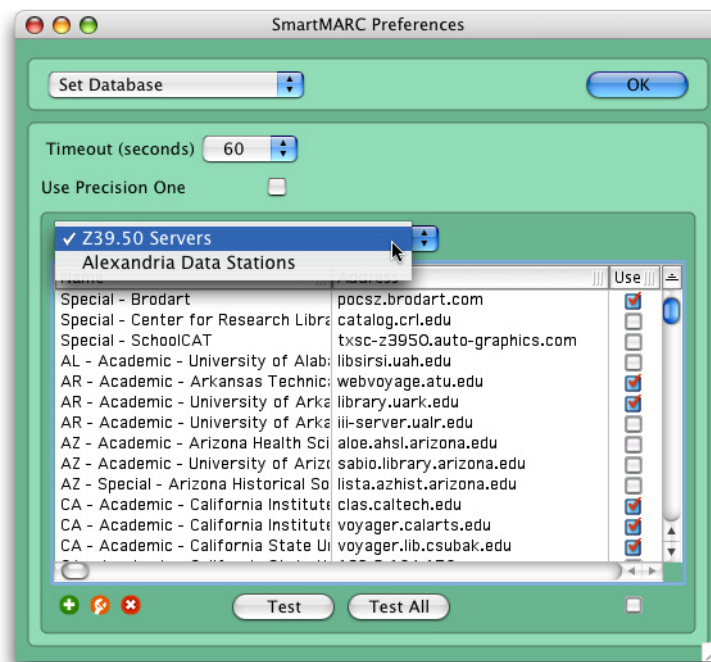
NOTE:

The **Z39.50 Servers** selection is only available if you have a persistent internet connection.

Z39.50 Servers

This window allows you to configure connection information for the Z39.50 servers that you may want to use for bibliographic record matching.

If you select **Z39.50 Servers** from the drop-down menu in the **Set Database** preference window, you will be shown an address book of available servers (as shown below).



This address book, which comes standard with SmartMARC, contains the friendly **Name** and physical **Address** of nearly 300 unique Z39.50 servers. Checking the boxes in the **Use** column tells SmartMARC to match against these servers during normal bibliographic search procedures.

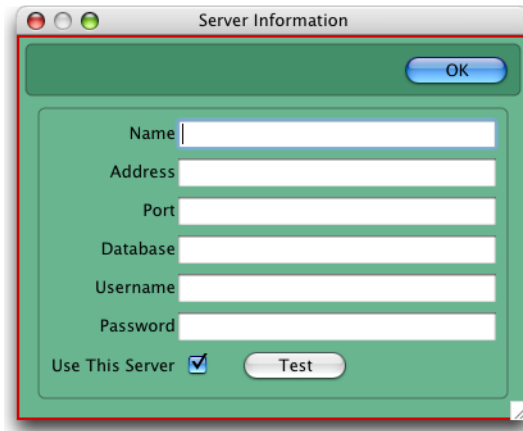
Place a checkmark into the box next to the name of each sever you would like to use. If you would like to uncheck all of the servers so that *none* of them will be used when searching, click on the “clear all” icon located to the right of the **Test All** button (i.e. bottom-right corner of the window).

You can use the icons located on the bottom-left corner of the window to add your own, remove, or edit the existing connection information for each Z39.50 server (see “*Adding A New Z39.50 Server*” on page 39 for more information).

Users can test an individual server by selecting (highlighting) one from the address book and clicking the **Test** button. Alternatively, users can audit all of the Z39.50 servers included in the address book by clicking on the **Test All** button (see “*Testing Z39.50 Servers*” on page 42 for more information).

Adding A New Z39.50 Server

To create a new Z39.50 server address, click the **Add New Server** icon (round, green “+”) and then proceed to enter the required server information into the blank fields of the **Server Information** window (detailed below).



NOTE:

It is very important to remember that **Username** and **Password** are *case sensitive*!

If you are having a hard time connecting to a specific server, double-check that you are using the proper case.

You will be required to provide a valid **Name**, **Address** (usually an IP address), **Port**, **Database** identifier, **Username**, and **Password** of an existing Z39.50 server.

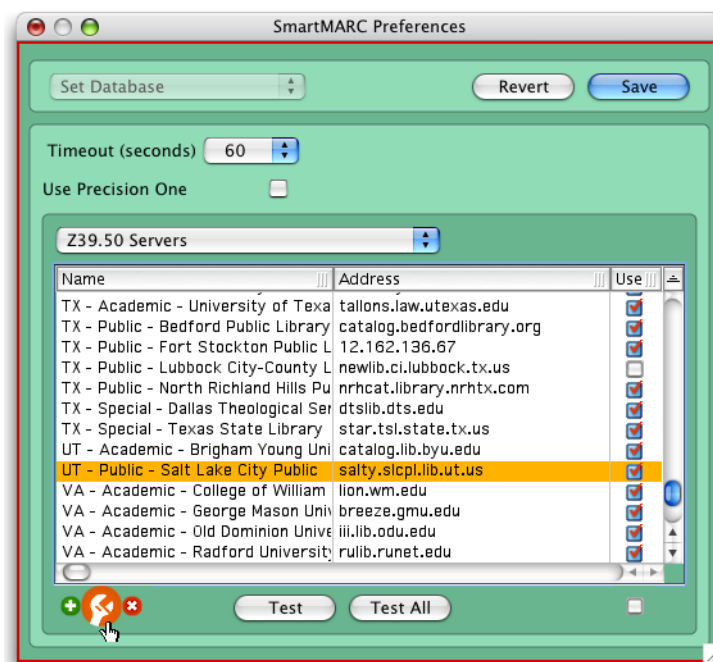
When you create a new server, it will be automatically added (in alphabetical order) to the Z39.50 address book in the **Set Database** preference window and then selected as the current server.

If you check the **Use This Server** box, the server will be automatically marked for use in the **Set Database** preference window (see previous page for details).

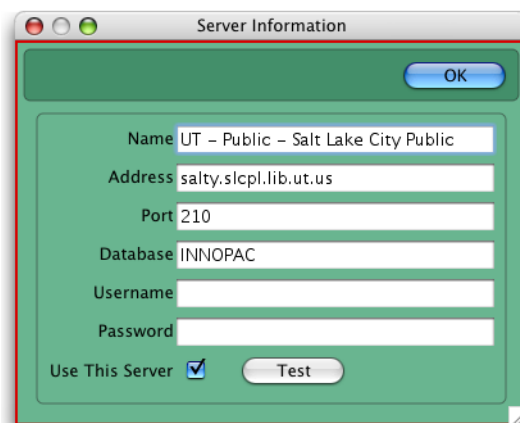
You may also test to make sure your newly created Z39.50 server is working properly by clicking the **Test** button. If the server does not appear to be communicating, review the server information that you supplied and make any necessary corrections.

Editing Z39.50 Server Information

To edit the address information of a single Z39.50 server, select (highlight) one from the address book in the **Set Database** preference window and then click the **Edit Selected Server** icon (orange “tool”).



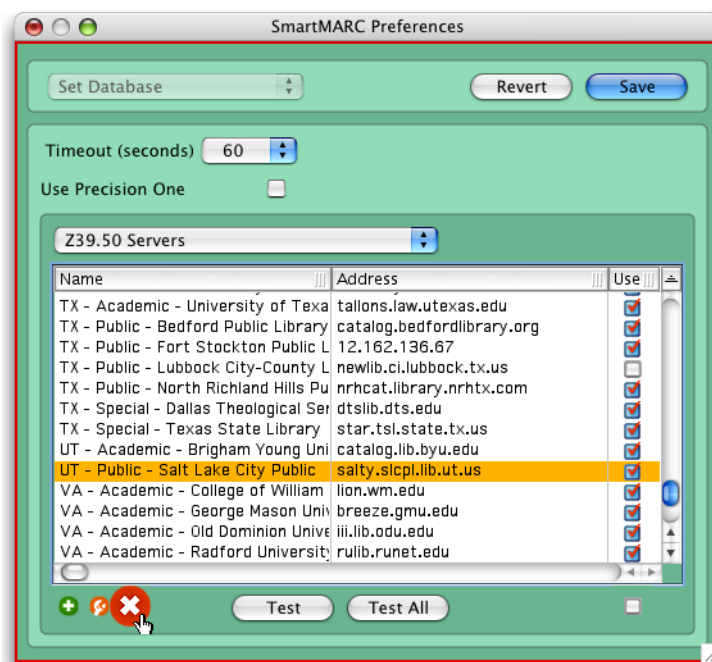
Next, the **Server Information** window appears, containing information about the server you selected.



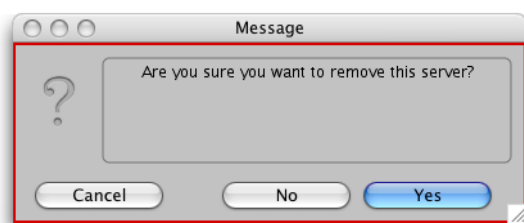
Make any changes you deem necessary—then use the **Test** button to make sure the server is communicating properly. If you attempt to close the **Server Information** window without first saving your changes, an error message will appear asking you to **Save**, **Revert**, or **Discard**.

Removing a Z39.50 Server

To remove a Z39.50 server from the address book in the **Set Database** preference window, select (highlight) an address from the list and click the **Remove Selected Server** icon (red “x”).



When you click on the **Remove Selected Server** icon, a warning message will appear, asking if you are sure that you would like to remove the server.



You can use the **Revert** button on the **Set Database** window if you mistakenly remove a server address; the **Revert** button will restore all server address information back to the original program defaults.

**NOTE:**

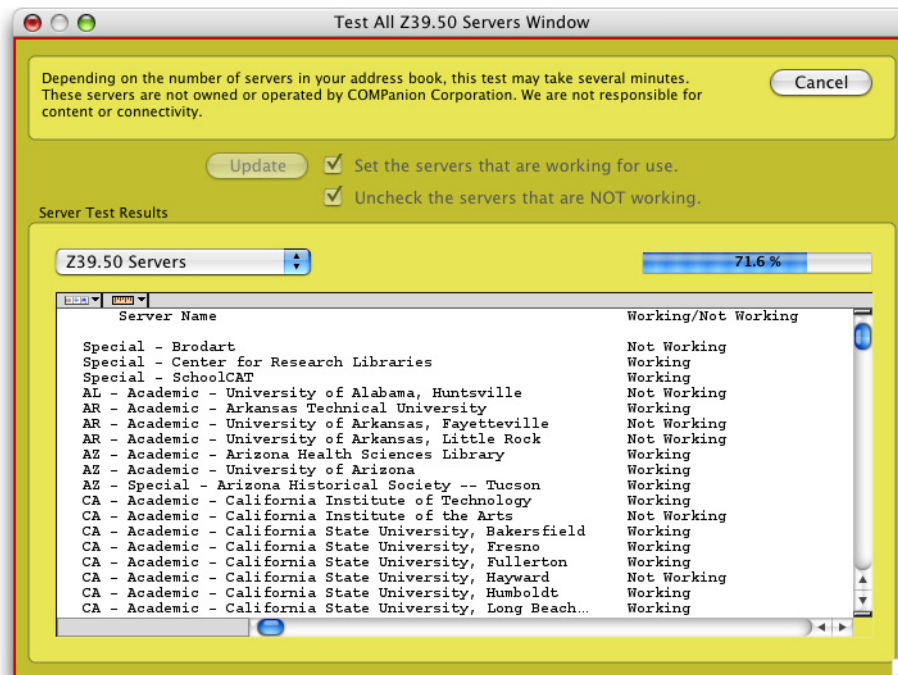
These servers are not owned or operated by COMPanion Corporation.

We are not responsible for content or connectivity.

Testing Z39.50 Servers

If you click on the **Test All** button in the **Set Database** preference window, the **Test All Servers** window will open. If you click the **Start** button, SmartMARC will audit all of the servers contained in the address book by test-pinging each one individually to make sure that a connection is available and that you are successfully receiving a response.

Depending on the number of servers in your address book, the **Test All** function may take several minutes to complete.



When the **Test All** function has finished, you can choose two apply two different preferences:

Set the servers that are working for use—By selecting this preference, servers that are deemed as working will be checkmarked in the Z39.50 address book.

Uncheck the servers that are NOT working—By checking this preference, servers that are *not* working will be deselected in your Z39.50 address book.

Make your selection(s) and then click the **Update** button to apply your changes.; your Z39.50 address book will be updated per the preferences you have selected and the **Test All Servers** window will close.

Please keep in mind that there are times when some of the Z39.50 servers will not be accessible. Be patient, sometimes the computer you are trying to establish a connection with will be shut off for routine maintenance or their internet connection will be down. Give it some time; a server that is down today may be available tomorrow.

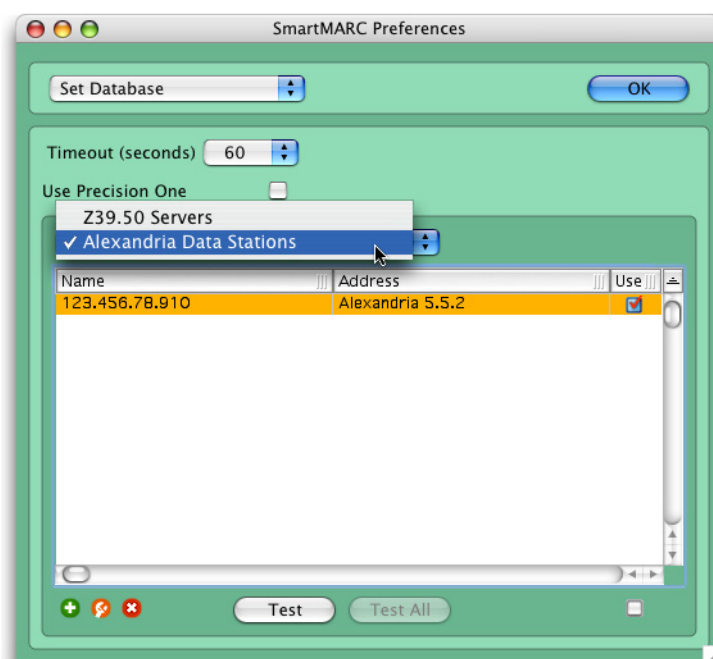
After the audit is complete, you are provided with a printable *.vwp* report of the server test results. This report details which of the servers connected and which of the servers failed to connect.

Alexandria Data Stations

This window allows you to configure the connection information for Alexandria Data Stations that you may want to use for bibliographic record matching.

If you select **Alexandria Data Stations** from the drop-down menu in the **Set Database** preference window, you will be shown an address book of available Data Stations (as shown below).

Unlike the **Z39.50 Servers** address book, by default, this one will appear empty.



Each Data Station will be identified by a friendly **Name** and physical **Address** (typically an IP address)—checking the boxes in the **Use** column tells SmartMARC to match against these Data Stations during normal bibliographic search procedures.

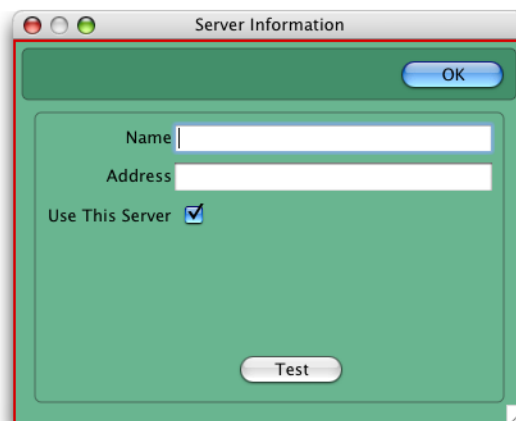
Place a checkmark into the box next to the name of each Data Station you would like to use. If you would like to uncheck all of the Data Stations so that *none* of them will be used when searching, click on the “clear all” icon located to the right of the **Test** button (i.e. bottom-right corner of the window).

You can use the icons located on the bottom-left corner of the window to add your own, remove, or edit the existing connection information for each Alexandria Data Station (see “Adding New Alexandria Data Stations” on page 44 for more information).

Users can test an individual Data Station by selecting (highlighting) one from the address book and clicking the **Test** button. Unlike the **Z39.50 Servers** address book, users will be *unable* to batch audit *all* of the Alexandria Data Stations included in the address book; the **Test All** button is disabled.

Adding New Alexandria Data Stations

To create a new Alexandria Data Station address, click the **Add New Data Station** icon (the round, green “+”) and then proceed to enter the required Data Station information into the blank fields of the **Server Information** window (detailed below).

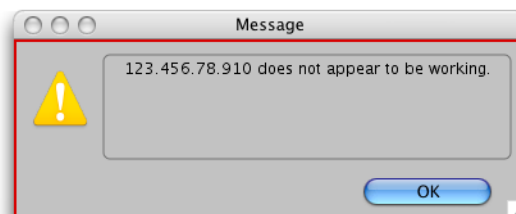


You must provide a friendly **Name** and **Address** (usually an IP address) of a valid Alexandria v5 Data Station.

When you create a new Data Station, it will be automatically added (in alphabetical order) to the **Alexandria Data Stations** address book in the **Set Database** preference window and then selected as the current Data Station.

If you check the **Use This Server** box, the Data Station will be automatically marked for use in the **Set Database** preference window (see previous page for details).

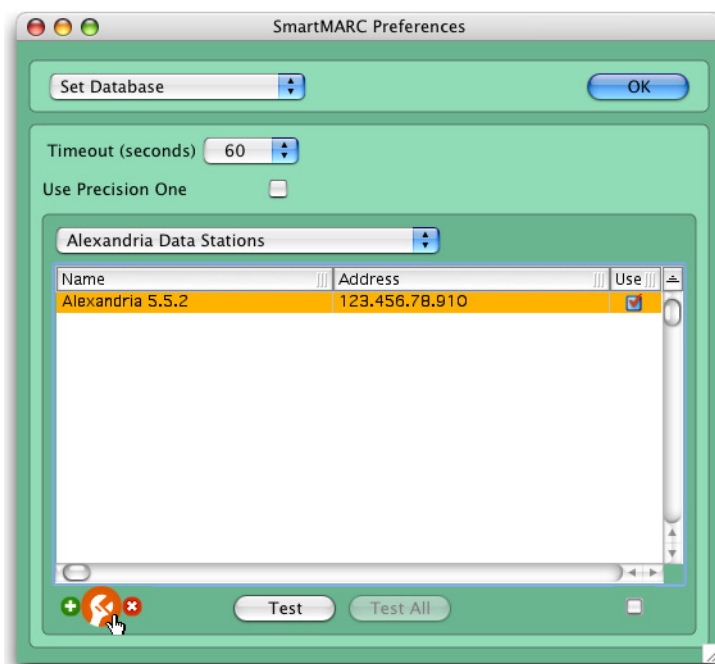
You may also test to make sure your newly added Alexandria Data Station is working properly by clicking the **Test** button—this will cause a **Message** window to appear.



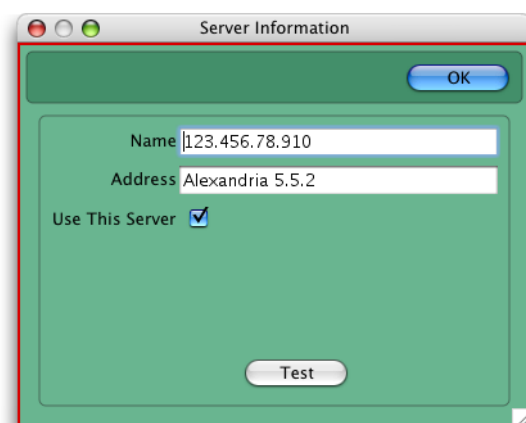
If the Data Station does not appear to be communicating, review the address information that you supplied and make any necessary corrections. The status of the Alexandria v5 Data Station will appear in the transaction log (whether it has connected or has failed to connect).

Editing Alexandria Data Station Information

To edit the address information of a single Alexandria Data Station, select (highlight) one from the address book in the **Set Database** preference window and then click the **Edit Selected Data Station** icon (orange “tool”).



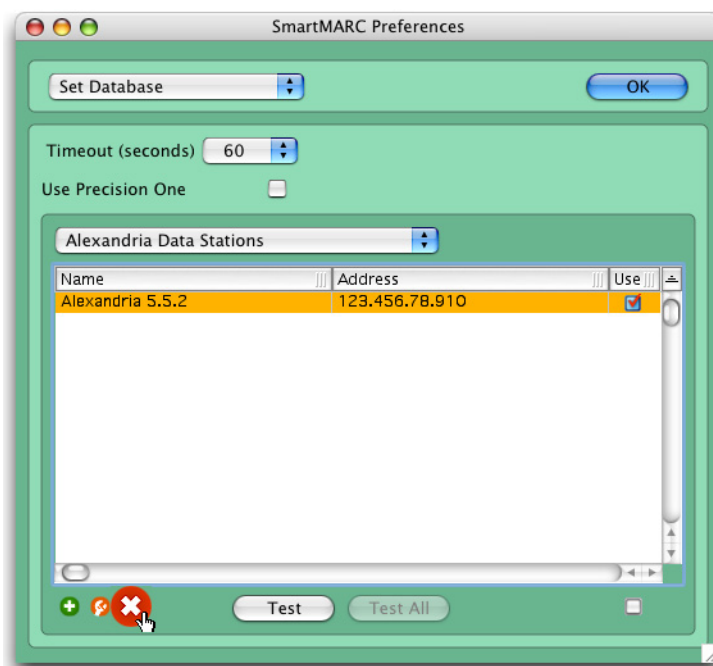
Next, the **Server Information** window appears, containing information about the Data Station you selected.



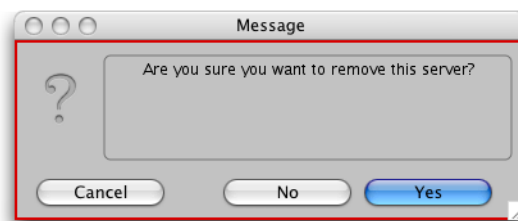
Make any changes you deem necessary—then use the **Test** button to make sure the Data Station is communicating properly. If you attempt to close the **Server Information** window without first saving your changes, an error message will appear asking you to **Save**, **Revert**, or **Discard**.

Removing an Alexandria Data Station

To remove an Alexandria Data Station from the address book in the **Set Database** preference window, select (highlight) an address from the list and click the **Remove Selected Server** icon (red “x”).



When you click on the **Remove Selected Data Station** icon, a warning message will appear, asking if you are sure that you would like to remove the Data Station.



You can use the **Revert** button on the **Set Database** window if you mistakenly remove a Data Station address; the **Revert** button will restore all previously entered Data Station address information.

Library Info

Use the **Library Info** preference window to provide information about your library.

SmartMARC Preferences

Library Info [OK]

Librarian Name []

Librarian Title []

Library Address [COMPanion Developer]
 Address [] City [] State [] Postal Code []
 Country []

Library ID Code []

Library Phone Number []

Library Fax Number []

Library Email Address []

Library SMTP Server []

Update Server [updateserver.companioncorp.com] [Reset]

Language [English]

- Local Info
- Single Search
- Auto Match
- Set Database
- ✓ Library Info
- Miscellaneous

Librarian Name—This is the name of SmartMARC’s primary user (or librarian).

Librarian Title—The position title of the primary user (or librarian).

Library Address—This field requires the name of the library and its physical address.

Library ID Code—This is the library location identification code. This is a short code that is used for the MARC location code at **852_a** in the copy collection field. Default is the first four characters of your library name. If you change this value, all future matched records will automatically have this value applied.

Library Phone Number—This field requires the phone number of the library.

Library Fax Number—This field requires the fax number of the library.

Library Email Address—This is the library’s email address, which is used as the return email address for all **Technical Support** correspondence. You must enter a valid email address to use most email services. If you don’t have an email address, enter “info@goalexandria.com” in this field; doing so will enable you to email **Technical Support**. However, if you do this, you *must* include a phone number in your email in order to receive a reply.

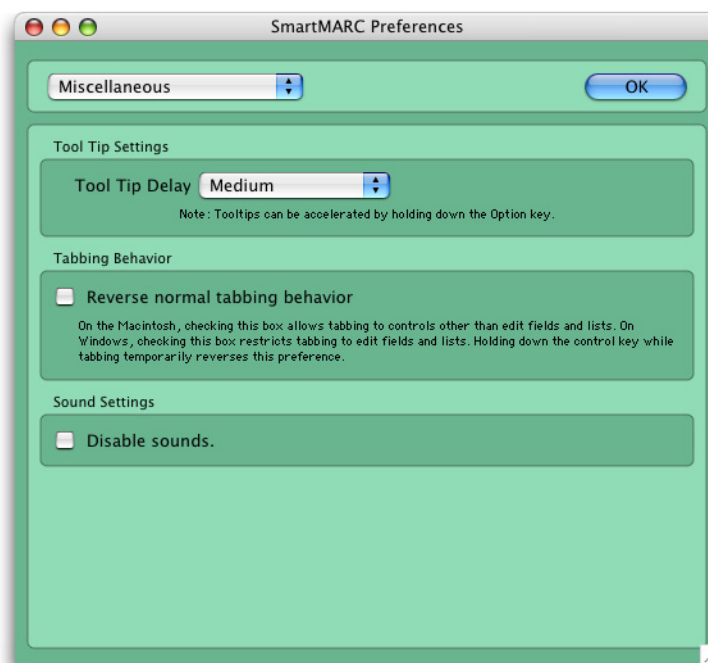
Library SMTP Server—The SMTP address of your library’s email server. Your email messages get routed through this server.

Update Server—This is the IP address of COMPanion’s **Update Server** (updateserver.companioncorp.com). Normally, this address will only be changed under the direction of **Technical Support**. The **Reset** button will restore the default SMTP address. Changes will not take affect until SmartMARC is restarted.

Language—Option to run SmartMARC in English (US) or Español.

Miscellaneous

Use these additional preferences to further customize the look and feel of the SmartMARC interface.



Tool Tip Settings

Tool Tip Delay—Selects delay time for tool tips (those short pieces of descriptive text that appear when you move your mouse cursor over buttons). Tool tips can also be viewed instantaneously by holding down the <ctrl> (Windows) or <option> (Macintosh) key and moving over buttons and fields. Default is **Medium**.

Tabbing Behavior

Reverse Normal Tabbing Behavior—On the Macintosh, if this box is not checked, it will allow users to <tab> through all of a given window's tabs quickly without having to also tab through all the drop-down menus and editable fields contained within that window.

If this box is checked (on the Macintosh), then <tabs> will scroll through *every* drop-down window and editable field contained within that window.

On Windows, the above checkbox order is completely reversed.

Holding down <ctrl> while tabbing will temporarily reverse this preference (i.e. the tab order).

Sound Settings

Disable sounds—Check this box if you would like *all* the sounds in SmartMARC turned off. Default is to have sounds enabled.

Brodart's Precision One



SmartMARC supports matching against Brodart's Precision One CD-ROM database. Precision One consists of two CD-ROMs, one being pre-1991 (Retro-Print) records and the second being bibliographic records added since 1991.

Brodart updates this second CD-ROM on a regular basis. With a Precision One subscription, you will receive a new CD-ROM on the third, sixth, and ninth month after your initial purchase.

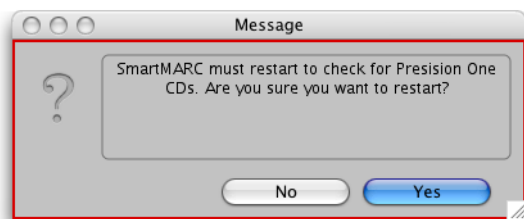
SmartMARC can search one CD-ROM singularly or both CD-ROMs at the same time. To search both CD-ROMs at once, you will either need a computer with two CD-ROM drives or you'll need to use SmartMARC to copy the Retro-Print CD-ROM (pre-1991) to your local hard drive.

- N O T E -

Since Brodart's Retro-Print CD-ROM is *only* licensed for a single user, you will need to keep it alongside any data that has been copied to your local hard drive. Only *one* computer may search the bibliographic information contained on the CD-ROM at a time.

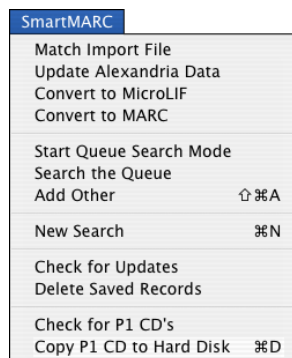
In order for SmartMARC to use the Precision One database, you *must* either have a Brodart Precision One CD-ROM in your CD-ROM drive or copied to the hard drive. You'll most likely want to search both CD-ROM databases, so don't forget to put the most current (quarterly) Precision One CD-ROM in the disc drive *before* you launch SmartMARC

SmartMARC can *only* use CD-ROMs that it discovers upon launch. However, if you've already launched SmartMARC, you can use the **Check for P1 CDs** command (located under the **SmartMARC** drop-down menu) in order to locate a belated Precision One CD-ROM.

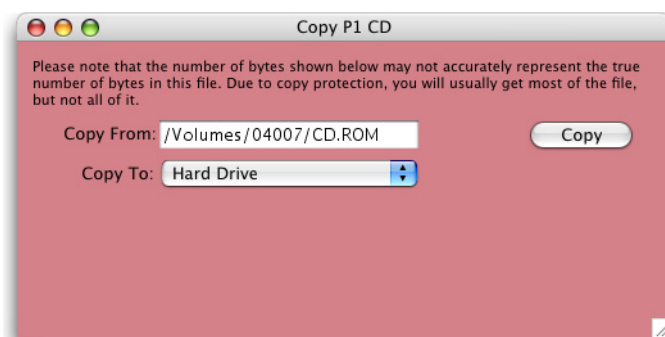


When SmartMARC is launched, the **SmartMARC Log** section of the **Search** window will display the number of Precision One CD-ROMs that have been located.

Copying the Retro-Print CD-ROM to Your Hard Drive



- Step 1. Insert the Retro-Print CD-ROM (pre-1991) into your CD-ROM drive. Since the Retro-Print CD-ROM is static (i.e. fixed, stationary) and does not undergo constant bibliographic updates, it is the better database to copy to your hard drive. Copying the Retro-Print CD-ROM almost entirely ensures that you will never have to perform this procedure again.
- Step 2. If you haven't already, double-click the SmartMARC icon to launch the program.
- Step 3. After SmartMARC has launched, select **Copy P1 CD to Hard Disk** from the **SmartMARC** drop-down menu. You may also use <command+D> (Apple) or <ctrl+D> (Windows) on your keyboard to begin the copy process.

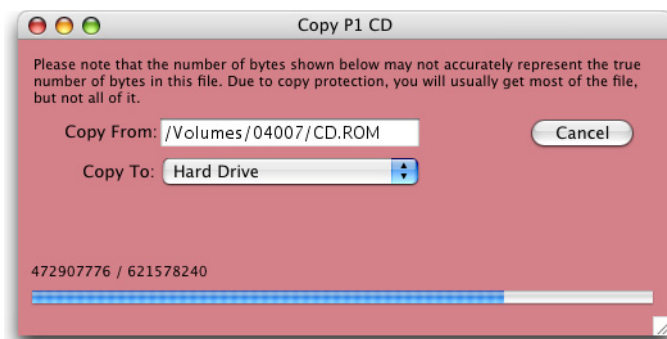


- Step 4. Using the **Copy To** drop-down menu, select the destination hard drive where you would like to copy the Retro-Print CD-ROM. The copied CD-ROM image *must not* be moved to any other folder on your hard drive. SmartMARC will determine the best name and folder location for this file. If you *do* change the name or location of the copied Retro-Print CD-ROM image, SmartMARC will not be able to locate it.
- Step 5. If there isn't sufficient room on your hard drive (about 700MB is required), you'll receive an error message. Otherwise, SmartMARC will copy the Retro-Print CD-ROM to the hard drive that you've selected.

- N O T E -

You may also copy the Precision One Update CD (bibliographic records added since 1991) to your hard disk drive. Searches performed on CDs copied to your hard disk drive are faster than searching from a CD in the CD-ROM drive. Each CD copied to the drive requires about 700 MB. Because of how much hard disk space each copy requires, most users choose to copy only the Retro-Print to their hard drive. Also, due to the frequency of updates, it may be impractical to copy over the Update CDs.

While SmartMARC is copying the Retro-Print database, the following window will appear:



- Step 6. Once the copy is complete, quit SmartMARC, eject the Retro-Print CD-ROM, and place it in a safe location (near your computer) for future use.
- Step 7. From now on, when you use SmartMARC, you'll only need to insert Brodart's latest (quarterly) Precision One CD-ROM into your CD-ROM drive.

Brodart's Z39.50 Server

Brodart's Z39.50 database contains over 2.5 million records, including pre-1968 records, which can't usually be found in other databases. This database is updated monthly and is faster and more accurate than most other Z39.50 databases.

Usage of Brodart's Z39.50 database can be purchased separately from COMPanion. If you are interested in subscribing to Brodart's Z39.50 database, please contact your COMPanion Sales representative at (800)-347-6439.

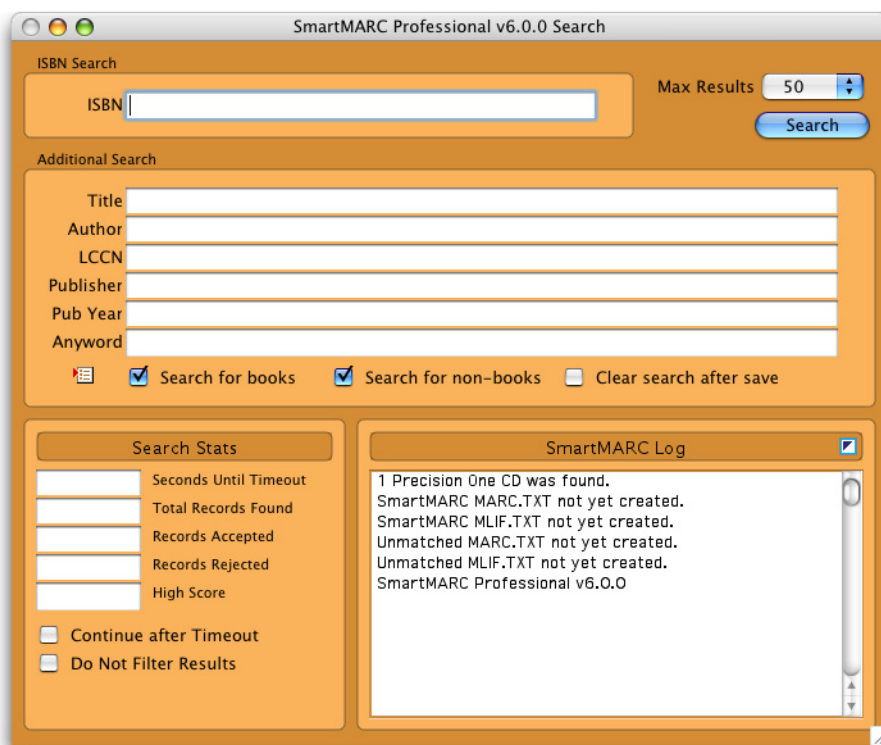
Search Window



This chapter will explain how to use the **SmartMARC Search** window to seek out MARC information and update your current database or import records.

The SmartMARC Search Window

The **Search** window is SmartMARC's *main* window, use it to perform a single search, start a search queue, view the transaction log, or monitor search statistics.



Use any of the following methods to view the **Search** window:

- Select **New Search** from the **SmartMARC** drop-down menu
- Press <cmd-N> (Macintosh) or <ctrl-N> (Windows) on the keyboard
- Select **SmartMARC Search** from the **Window** system drop-down menu.

Using the Search Window

The top portion of the **SmartMARC Search** window contains the **ISBN** search and **Additional Search** information fields. For more information on these fields and how to perform a single search, please review the “Performing a Single Search” section, starting on page 56.

Search Statistics

The **Search Stats** section of the **SmartMARC Search** window (found on the lower-left side of the window when the **SmartMARC Log** is minimized) contains statistical information about each and every search you perform.

- N O T E -

During a **Queue Search**, the **Search Stats** section will change to reflect queue-related information (*see page 58*).

Seconds Until Timeout—This field will display how many seconds remain before communications with the database (being searched) are severed. The **Timeout (seconds)** value that appears in this field can be configured in the **Set Database** preference window (*see “Set Database” on page 37*). Each database can have its own default timeout value. SmartMARC will discontinue searching when this value reaches zero.

Total Records Found—This field contains a value that indicates the total number of bibliographic records that match the current search information.

Records Accepted—This field contains a value that indicates how many of the total “found” records have a high enough match score to be accepted.

Records Rejected—This field contains a value that indicates how many of the total “found” records found have a match score too low to be accepted or do not meet the ‘books or non-books’ criteria.

High Score—As SmartMARC examines matching records, it assigns a score to each record. The higher the score, the more accurate the match. This field will display the highest match score found for any one record during the search process. For more information on how SmartMARC scores records, see page 77.

Continue After Timeout—If this box is checked, SmartMARC will continue to search even after communications with the server have timed out. Default is unchecked.

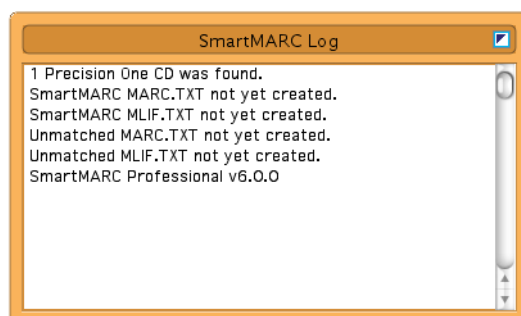
Do not filter results—If this box is checked, SmartMARC will *not* filter rejected records based on score from the **SmartMARC Results** window. Records will still be rejected if they do not meet the ‘books or non-books’ criteria. Default is unchecked.

SmartMARC	
Match Import File	
Update Alexandria Data	
Convert to MicroLIF	
Convert to MARC	
Start Queue Search Mode	
Search the Queue	
Add Other	⌘A
New Search	⌘N
Check for Updates	
Delete Saved Records	
Check for P1 CD's	
Copy P1 CD to Hard Disk	⌘D

SmartMARC Log

The **Search window** also contains an activity log that records all of the actions that were performed while using SmartMARC. All the information contained in the log is also saved to the hard drive as a text file named **SmartMARC Log.txt** (located in the **SmartMARC** folder).

You can make the log larger (consequently replacing the **Search Stats** section of the **Search** window) by clicking on the blue “up arrow” icon which is located at the top right-hand corner of the **SmartMARC Log** field. Click on the resulting blue “down arrow” icon will minimize the log.



The **SmartMARC Log** records the following information:

- The copying of Brodart's Precision One Retro-Print CD-ROM.
- All SmartMARC searches and the number of records located.
- All saved records and their titles.
- The message that appears when the program is first launched.

If you remove the **SmartMARC Log.txt** file, SmartMARC will create a new one the next time that SmartMARC is launched. If an existing **SmartMARC Log.txt** file is found, new information will be added to the existing file.

Performing A Single Search

To search for a matching bibliographic item record, do the following:

If the item you are trying to match contains an ISBN or UPC, position the cursor in the **ISBN** field and scan¹ the item's UPC barcode or manually enter the ISBN and press the <enter> key. If no matching records are found, SmartMARC will provide an error message, informing you that no matches were discovered and then open the **Add Other** window (if your **Single Search, Failed Search Action** preferences are configured to do so).

- N O T E -

One of the following fields must be searched: **ISBN**, **Title**, **Author**, or **LCCN**. At least six search characters (total, in any combination) must be entered into any of these four fields.

If your item doesn't have a barcode, or the ISBN search has failed, manually enter your item information into the **Title**, **Author**, **LCCN**, **Publisher**, **Pub Year**, and **Anyword** fields of the **Search** window's **Additional Search** information section.

- H I N T -

You don't need to provide information for all the fields listed above, just enough of them to get an accurate match for the bibliographic record for which you are searching. For example, if the title for a book is unique (e.g. *A Wrinkle In Time*), you may only need to enter the title. However, depending on your needs, you may also enter the author's last name, publisher, or publication year.

1. You must have a scanner that is programmed to correctly read UPC codes. Not all scanners can be used for this function. Call COMPanion for information on your scanner. The SmartMARC program automatically translates the UPC into a valid ISBN number which can then be used when searching internet databases.

You can force SmartMARC to only search for books by checking the **Search for books** box located near the bottom of the **Additional Search** information section. You can include items that are not books by selecting the **Search for non-books** checkbox. One of these two options *must* be checked or SmartMARC will never locate any matching records.

If you check the **Clear search after save** box, all the fields of the **Search** window will be cleared after a successfully matched record has been saved.

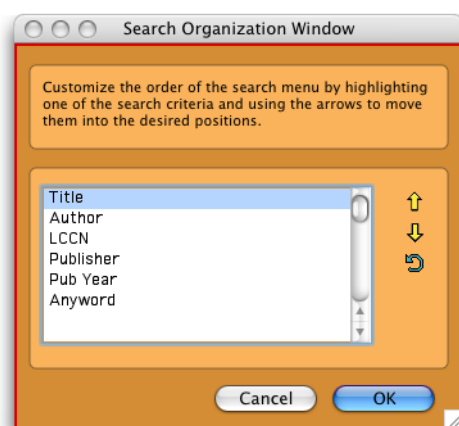
The **Max(imum) Results** drop-down menu is used to limit the number of matching records that are returned for every search. The default is set to 50, but depending on your needs, you may select up to 250.

- N O T E -

Publisher, **Publication Year**, and **Anyword** help records to score higher but do not cause records to be rejected. **Publisher** may have several imprints and various catalogues may have entered different publishers or imprint names.



You may also click on the **Customize Additional Search** icon, which opens the **Search Organization Window** (see below) and allows you to customize the **Additional Search** information field order.



Use the yellow “up” and “down” arrows to change the order of the fields. When you are happy with their order, click the **OK** button and the **SmartMARC Search** window will change accordingly.

Click the **Search** button or press <enter/return> in an information field to perform your single search.

SmartMARC also remembers the very last search term or search entry for each of the **Additional Search Information** fields and can recall that information for the next search (or future searches). To recall the last search entry, place your cursor into the desired field and type <cmd+=> on your keyboard.

Using the Queue Search Mode

If you would like to perform batch (multiple item) searching, you can toggle to SmartMARC **Queue Search Mode**.

The queue search mode differs from the single search mode in that every time you scan an UPC barcode or manually enter record information followed by <enter/return>, SmartMARC *will* not immediately perform a record search.

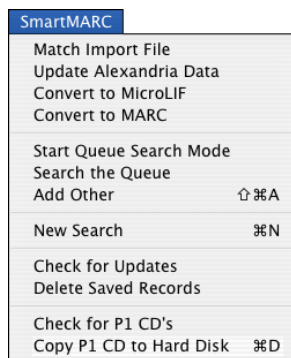
Instead, all the search queries you enter into the **Search** window are saved to a queue on the hard-drive and the search can be performed at a later date.

Since searching can take time (particularly when using Z39.50 servers with slow internet connections or response times), the **Queue Search Mode** allows users to input a lot of searchable data and then have SmartMARC match at leisure. For example, you can use the **Queue Search Mode** to match a pile of books using only their ISBN numbers; here's how:

You can toggle the SmartMARC queue mode by selecting **Start Queue Search Mode** from the **SmartMARC** system drop-down menu.

You are able to tell when you are in this mode because the **SmartMARC Search** window will display a **Queue** button below the **Max Results** drop-down menu rather than the standard **Search** button.

Enter search information into the **ISBN** search and/or **Additional Search** information fields. When you have entered all the search information that you require for a particular item, press the <return> or <enter> key. The **SmartMARC Local Information** window will appear (*see "Local Information Window" on page 75*).



This window allows users to add specific, local collection information to the items that are effectively matched. If a search is successful, then the information that is supplied here will be embedded into the finished MARC/MicroLIF record.

When you have entered all the search information that you require (for multiple searches), SmartMARC will then save them to the hard drive until you are ready to begin batch-matching.

To begin batch-matching all the records you have queued (saved to disk), select **Search the Queue** from the **SmartMARC** system drop-down menu.

Selecting **Search the Queue** will terminate the **Queue Search Mode** (if you haven't done so already) and then begin searching for all the record information you've entered into the queue.

During a **Queue Search**, the **Search Stats** section of the **Search** window will change to reflect queue-related information. Here is a small, descriptive summary for each of the queue search statistics:

Seconds Until Timeout—This field will display how many seconds remain before communications with the database (being searched) are severed. The **Timeout (seconds)** value that appears in this field can be configured in the **Set Database** preference window (*see "Set Database" on page 37*). Each database can have its own default timeout value. SmartMARC will discontinue searching when this value reaches zero.

Skipped Records—This field contains a value that indicates the total number of records that are skipped because they contain a **40_a** tag, which generally means they've already been through a matching process.

Matched Records—This field contains a value that indicates the total number of records in the queue that were successfully matched by SmartMARC.

Unmatched Records—This field contains a value that indicates the total number of records in the queue that SmartMARC was unable to match successfully.

Total Searched—This field contains a value that indicates the total number of records in the queue that were searched either successfully or unsuccessfully (i.e., matched or unmatched).

After your initial batch-matching (queue) operation has successfully completed, examine the **Unmatched MARC** or **MicroLIF** record file located in your **SmartMARC** folder. During a **Queue** search, if any of your records weren't provided with a match, they will be catalogued in this text file. You may want to select a different bibliographic database to match any previously unmatched bibliographic records against.

Other Search Options / Finishing A Search

If you are planning on updating an Alexandria v5 database or performing a queue search, use the selections housed under the **SmartMARC** system drop-down menu (*see “SmartMARC Menu” on page 22*).

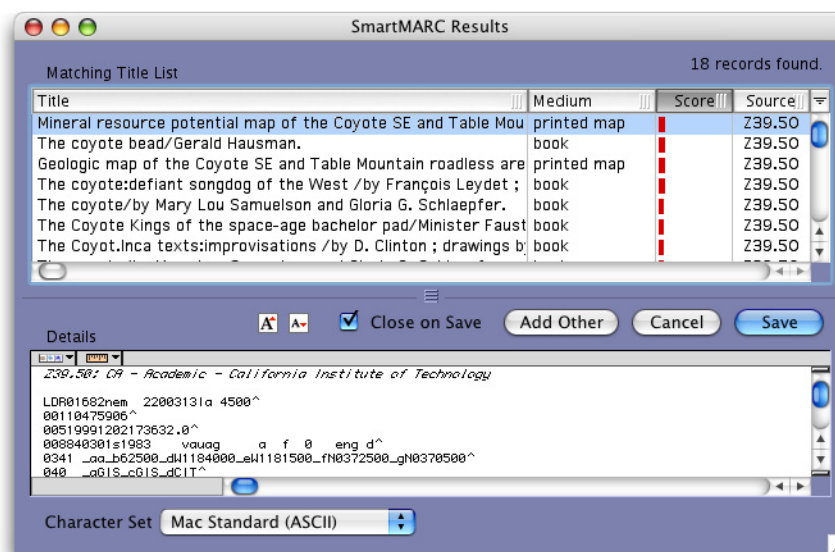
Once you’ve finished locating your bibliographic records, you may import the resulting **SmartMARC MicroLIF** or **MARC** matched (or updated) record files (located in the **SmartMARC** folder) into any program that supports MARC or MicroLIF data.

If you have questions about the SmartMARC search process, please call COMPanion’s Technical Support department at (800) 347-4942 or (801) 943-7277 or send an email to:
support@companioncorp.com

The SmartMARC Results Window

Depending on your **Single Search Preferences**, after a search has been successfully completed, all matching bibliographic records located by SmartMARC will be displayed in the SmartMARC Results window.

Along with the matching **Title(s)**, the **SmartMARC Results** window will also display the match **Score** and the **Source** where the record information was located.



A bibliographic record **Score** is a relative number that indicates the comparative closeness of a matched record. Although a higher score is “better,” the actual number means nothing about the quality of the record. A record that receives a score of 100 isn’t necessarily twice as good as a record that scores a 50 (see “How does SmartMARC score records?” on page 77). If you are particular about your bibliographic records, you should manually check every high-scoring match and hand-pick the records you like best.

You can use the slider bar or the up and down arrow keys on your keyboard to scroll through matching records.

As you scroll through the **Matching Title Lists** selections, if you click on (highlight) a record title, its bibliographic information will be displayed¹ in the **Details** section of the **Results** window. Once you’ve located the record information you would like to keep, double-click on it or select (highlight) it and press <enter/return> (or click the **Save** button). If you are not satisfied with any of the search results, close the window or click **Add Other** (see “Add Record” on page 62).

SmartMARC allows the user to increase and decrease the size of the text within the **Details** section of the **Results** window using the upper and lowercase “A” icons. These icons can be clicked multiple times until the desired text size is achieved.

1. You can drag a bibliographic record from the results window onto your operating system desktop or any software application that supports drag and drop. You can also copy the bibliographic record by highlighting all the text and selecting **Copy** from the **Edit** menu. This can be very handy if you want to email a bibliographic record to a friend—just look it up, copy it, and paste it into an email message.

Add Record

If you are not satisfied with any of the search results, click the **Add Other** button on the **Results** window to manually enter bibliographic information for your item.

Clicking the **Add Other** button will open the **Add Record** window. You can also access the **Add Record** window at any time by selecting **Add Other** from the SmartMARC system menu.

If you have it readily available, you can use the **Add Record** window to manually enter **Key** and **Private** information for your bibliographic record.

To add or edit specific subject tag information, click on the **Edit Subjects** button of the **Add Record** window. Doing so will open the **Subjects Window** (see *“The Subjects Window”* on page 63).

If you would like to modify the information in the bibliographic record more extensively, click the **Modify Record** icon located at the top left-hand side of the **Add Record** window (see *“Modify Record”* on page 65).

When you have finished entering all pertinent record information, click on the **Save** button to keep the new record or **Cancel** to discard it.

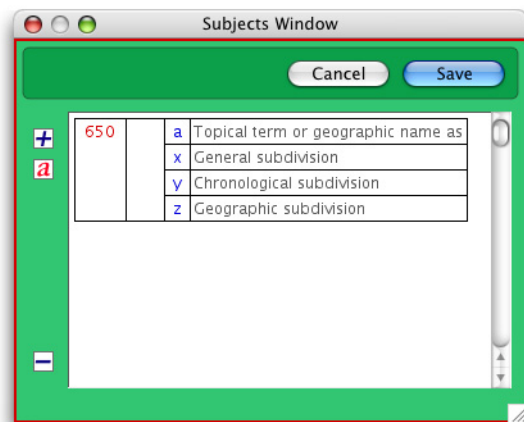
The Subjects Window

The **Subjects Window** allows you to easily add new subject tags, including detailed subject subfields, to any item record. This window is similar to any MARC editor (including Alexandria v.5's MARC Editor) that you may have used in the past. If you are unfamiliar with MARC standards, you may not want to use this window.

You can learn more about MARC tags and subfields by visiting:

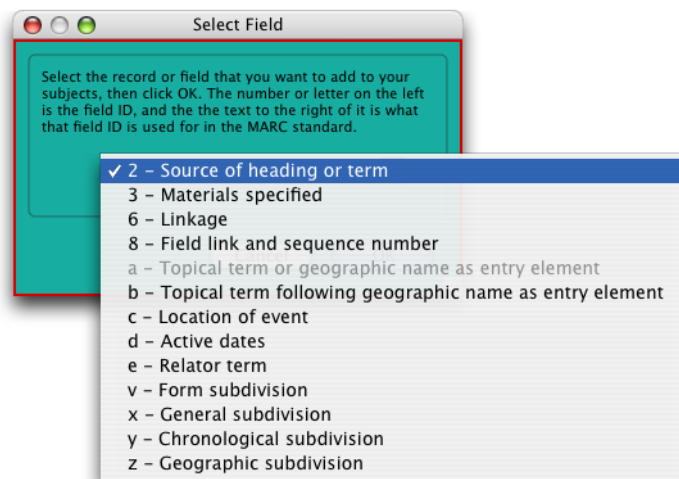
<http://www.loc.gov/marc/bibliographic/ecbdhome.html>

Subject	
Add Subject Record	⌘R
Remove Subject Record	⇧⌘R
Add Subject Field	⌘U



Clicking on the **Subject Window's Add Tag** (“+”) or **Add Subfield** (“a”) icons will open the **Select Record** or **Select Field** windows.

You can also remove a tag using the (“-”) icon.



Using the drop-down menus located on the **Select Tag** and **Select Field** windows, choose the corresponding tag or subfield that you would like to add to this item record and click **OK**. If you change your mind, click **Cancel**.

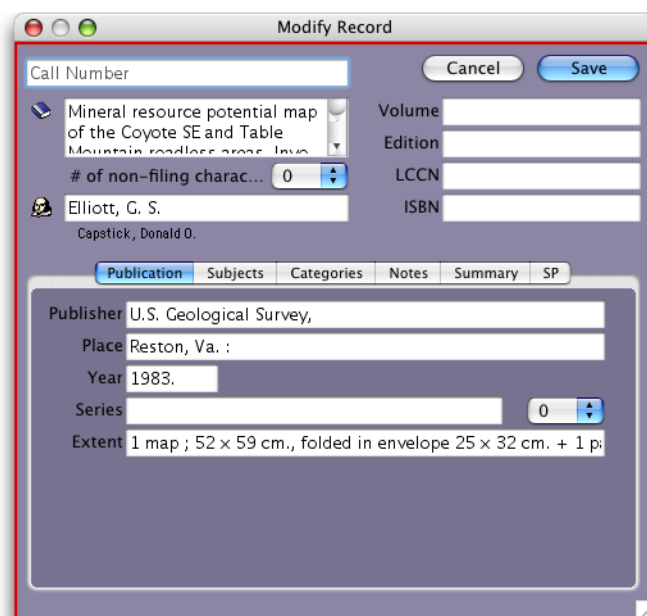
The order in which *fields* are stored, displayed, and shown within a particular *tag* will be the order in which they were created. Tags will always be saved in numerical order. Any empty fields will be removed when saved.

The **tag** and **subfield** information you choose from these window's drop-down menus will be added to the **Subjects** window.

Close the **Subjects** window to save your changes.

Modify Record

If you've used Alexandria (COMPanion's automated library software) in the past, then you'll notice that SmartMARC's **Modify Record** window is similar to Alexandria's **Item Management** window.

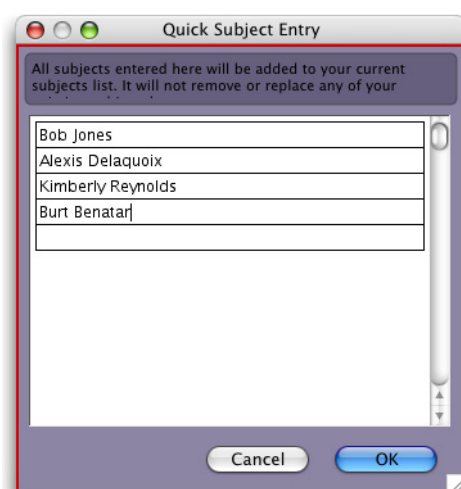


The **Modify Record** window is a macOS-style dialog box with a title bar containing standard window controls. It features a **Call Number** text field at the top left. To its right are **Cancel** and **Save** buttons. Below the call number is a list box containing the title "Mineral resource potential map of the Coyote SE and Table Mountain roadless area, Inyo". To the right of the list box are fields for **Volume**, **Edition**, **LCCN**, and **ISBN**. Below the list box is a **# of non-filing charac...** field with a value of 0. To the right of this is a field for the author "Elliott, G. S." with a small icon to its left. Below the author field is the text "Capstick, Donald O.". At the bottom of the window is a tabbed interface with tabs for **Publication**, **Subjects**, **Categories**, **Notes**, **Summary**, and **SP**. The **Publication** tab is currently selected, showing fields for **Publisher** ("U.S. Geological Survey,"), **Place** ("Reston, Va. :"), **Year** ("1983."), **Series**, and **Extent** ("1 map ; 52 x 59 cm., folded in envelope 25 x 32 cm. + 1 p").

Using the Modify Record Window

The top portion of the **Modify Record** window contains primary item information such as call number, title, author, volume, and edition (see *"Primary Modify Record Window Information" on page 66*). Located below these fields are tabs that contain more focused, better detailed information about the current item. Clicking on the **Publication**, **Subjects**, **Categories**, **Notes**, and **Summary** tabs will display more item information (see *"Secondary Modify Record Window Information" on page 70*).

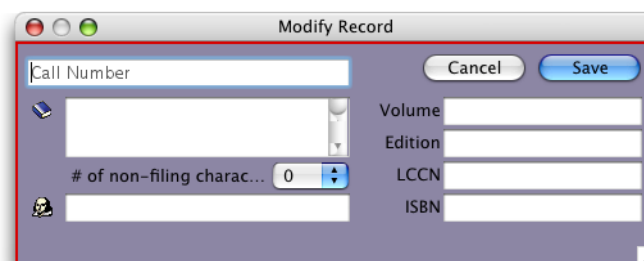
The intricacies of the **Modify Record** window will be detailed in the following pages.



The **Quick Subject Entry** window is a macOS-style dialog box with a title bar containing standard window controls. It features a text area at the top with the instruction: "All subjects entered here will be added to your current subjects list. It will not remove or replace any of your". Below the text area is a list box containing the following subjects: "Bob Jones", "Alexis Delaquoix", "Kimberly Reynolds", and "Burt Benatar". At the bottom of the window are **Cancel** and **OK** buttons.

Primary Modify Record Window Information

The top portion of the **Modify Record** window contains primary information about the item being modified. This includes the call number, title, author, volume, edition, LCCN and ISBN.



The fields contained in the upper portion of the **Modify Record** window are as follows:

Call Number—Each item is assigned an individual call number. The call number designates the location of an item in the library. Because call numbers are site-specific rather than universal (such as LCCN and ISBN), you must enter call numbers specific to your library. The title call number is saved in MARC field **900_a**.

Depending on their source, bibliographic import records *may* or *may not* include a call number for your item.

Volume—This field is used to identify multiple-volume works such as encyclopedias, periodicals, and books. Only volume designators are valid in this field (the word “volume” will automatically appear when volumes are referenced on an Alexandria Search window).

If the item isn't part of a multiple-volume work, leave this field blank. The volume is saved in MARC tag **092_v** or **440_v**.

Edition—Enter edition information. For example, “2nd Ed.” or “2nd rev. Ed.” Edition information is saved in MARC field **250_a**.

LCCN—Enter the item's **L**ibrary of **C**ongress **C**ontrol **N**umber. The LCCN is a unique 8-digit identifier assigned to an item's bibliographic record. You may enter the LCCN with or without punctuation, however, only numeric digits are saved. LCCN is saved in MARC field **010_a**.

ISBN—Enter the item's **I**nternational **S**tandard **B**ook **N**umber. The ISBN is a unique identifier. A title may have more than one ISBN (e.g. the ISBN for the hardback edition differs from the paperback edition). SmartMARC will only display the first ISBN that it finds in the MARC record. ISBN is saved in MARC field **020_a**.

You can enter an ISSN rather than an ISBN. If the number you enter is 8 digits, SmartMARC assumes the number is an ISSN and saves it at MARC tag **022_a**. If it has 10 digits, SmartMARC assumes it is an ISBN.

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If you enter an invalid ISBN, a question mark (?) will appear at the beginning of the number to indicate it is not a valid number. Any punctuation, dashes, or spaces are considered invalid and will be automatically removed by SmartMARC.

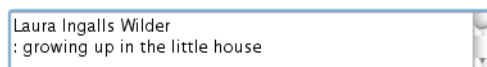
Title and Author Editor

SmartMARC includes a **Title** and **Author Editor** in the **Modify Record** window. This feature allows those who are MARC knowledgeable to easily modify tags and subfields as they see fit. The following sections will first explain how to enter MARC record information using the **Title** and **Author** fields, and will then be followed with instructions on how to use the **Title** and **Author** Editor.

Title—This information is required; the record will not be saved unless a value is provided in the **Title** field. The title is saved at MARC tag **245_a**.

In the **Title** field, if you enter a title that is longer than the length of the text field, the text will wrap to the next line. To enter a subtitle, press <return> on the keyboard and enter a colon (“:”) followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved at MARC tag **245_b**. You can also use the equals sign (“=”) in the **245_b** tag to designate a subtitle. However, the (“=”) is mainly for multilingual titles.

For example:



Laura Ingalls Wilder
: growing up in the little house

If you want to continue manually entering or editing MARC information using the **Title** field, you can enter statements of responsibility and general material designations. Begin a statement of responsibility (**245_c**) with a front slash (“/”) and enclose the medium in brackets (“ [] ”). All subfield information *must* begin on a new line in the **Title** field.

If you enter a medium, it will be saved (but not displayed in the title field).

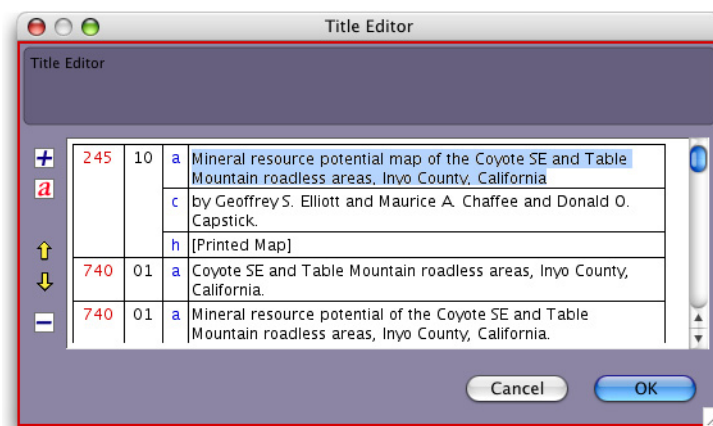
If you enter a statement of responsibility, it will also be saved, but not displayed in the title field afterward.

of Non-Filing Characters—Underneath the **Title** field is the **# of Non-Filing Characters** drop-down menu containing the digits 0–9. Use this drop down menu to indicate the number of characters in the title that SmartMARC should ignore when it indexes the title. Thus, the title *The Wizard of Oz* should have a “4” selected so the book is sorted (indexed) as “*Wizard of Oz*”. The final character to ignore must be either a space or punctuation character. If this indicator is set incorrectly, SmartMARC will revert the **# of Non-Filing Characters** setting back to zero rather than ignore a partial word.

Author—Enter “Last name, First name” in the author field. This is the primary author saved at MARC tag **100_a**. To add/edit additional authors, use the **Author** or **MARC Editor** and add them by repeating the **700_a** tag or by using another appropriate tag.

Title Editor

If you want a quicker, easier method of editing title fields, click the **Title Editor** icon located to the left of the **Modify Record** window's **Title** field. The following window will appear:



Title Editor



Add Tag



Add Subfield



Remove Tag



Move Up



Move Down



The **Title Editor** allows you to easily create multiple detailed subfields or add new **tags** to any item's title. This method of entering information is far superior to that of the **Modify Record** window's **Title** field.

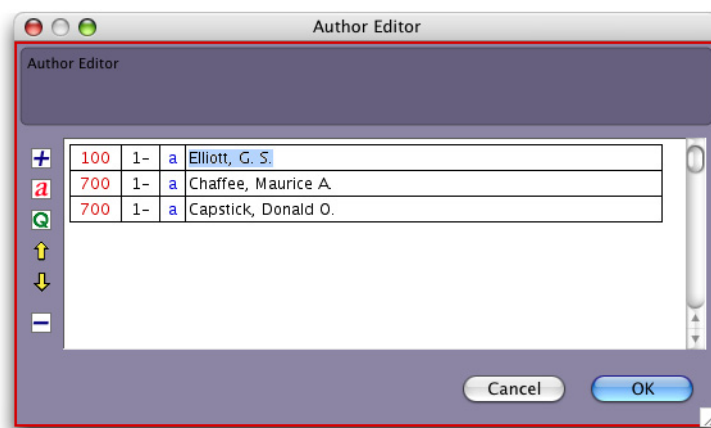
Click on the icons to the left of the **tag** field to add a **New Tag** (“+”), add a **New Subfield** (“a”), or to remove a tag (“-”). Use the yellow up and down arrows to adjust the position of a field within a tag; for instance, clicking the yellow up arrow icon will move the current field up one position.

The order in which fields are stored, displayed, and shown within a particular tag are the order in which they were created. Tags will always be saved in numerical order. Any fields that are left empty will be removed when saved.

Author Editor

When you have more than one author (or person responsible for publication), click the **Author Editor** icon located to the left of the **Modify Record** window's **Author** field. Use this editor to add, modify or remove authors.

When you click on the **Author Editor**, the following window will appear:



Author Editor



Add Tag



Add Subfield



Remove Tag



Move Up



Move Down



The **Author Editor** allows for the easy creation of multiple fields or the ability to add new tags to any item.

Click on the icons located to the left of the **tag** field to add a **New Tag** (“+”), add a **New Subfield** (“a”), or to remove a tag (“-”). Use the yellow up and down arrows to adjust the position of a field within a tag; for instance, clicking the yellow up arrow icon will move the current field up one position.

Users can also quickly add numerous author entries by clicking on the green **Quick Author Entry** icon (“Q”).

Users will be able to type in multiple author names quickly. When they are finished, clicking the **OK** button will immediately add these names to the tag.

Please note, the first author is stored at MARC tag **100**, additional authors will usually stored be in MARC tag **700**.

Secondary Modify Record Window Information

The bottom-half of the **Modify Record** window houses five tabs, each containing additional information for each bibliographic record. You will be unable to view or edit information until the record has been saved.

Publication tab

The fields in the **Publication** tab can contain item publication information.

The screenshot shows a window titled 'Publication' with several tabs: 'Publication', 'Subjects', 'Categories', 'Notes', 'Summary', and 'SP'. The 'Publication' tab is active. Below the tabs are five input fields: 'Publisher', 'Place', 'Year', 'Series', and 'Extent'. The 'Series' field has a dropdown menu with '0' selected.

Publisher—Enter the name of the publisher. Saved in MARC Field **260_b**.

Place—Enter the location of publication. Saved in MARC Field **260_a**.

Year—Enter the year of publication. Omit ending punctuation. Estimated dates are enclosed in brackets. Saved in MARC field **260_c**.

Series—If the item is part of a series, enter the series name here. Otherwise, leave this field blank. Saved in MARC field **440_a**.

Extent—Enter physical information about the item (e.g. number of pages, total playing time, number of slides, illustration information). You can specify which subfield the extent data is saved in by following AACR2 rules of punctuation.

300_a (Extent), has no preceding punctuation.

300_b (Other Physical Details, such as illustration info), preceded by a colon.

300_c (Dimensions), preceded by a semicolon.

300_e (Accompanying Material), preceded by a plus sign.

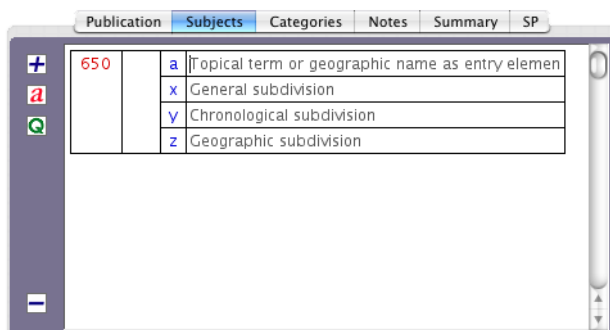
For example: 300_aFilmstrip_bColor_c35mm_eSound cassette.
is shown as: "Filmstrip: Color; 35mm +Sound cassette."

Another example: 300_a161 pp._c22 cm._e161 pages with illls.
is shown as: "161 pp.; 22 cm.+161 pages with illls."

Subjects tab

This tab opens the **Subject Editor** and allows for more refined subject entries.

The **Subjects** tab allows you to edit and create any subject tag. For each new subject tag you create, a separate line is created with default subfields. General **650** subjects will default with the topical data at **General Topic (_a)**, the general data at **General (_x)**, chronological data at **Chronological (_y)**, and geographic data at **Geographic (_z)**.



The information that you provide in this tab can be referenced when patrons search for items in their collection. For example, if you add “Mythology” in the **650_a** column, users can search the library for “Mythology” and these items will be included in the results.

Any subjects that you create must have at least two characters and can be a single word or phrase. You can edit different subject categories by clicking in their subfield box.

The order in which *fields* are stored, displayed, and shown within a particular *tag* will be the order in which they were created. Tags will always be saved in numerical order. Any empty fields will be removed when saved.

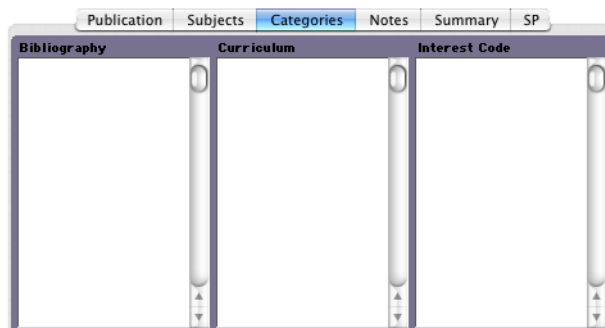
To remove a tag or field, (select) highlight it and press the **Remove Tag** icon (“–”) located at the bottom-left side of the **Subjects** tab.

Users can also quickly add multiple subject entries by clicking on the green **Quick Subject Entry** icon (“Q”). On the window that appears, users can type in as many subject entries as they desire. When they are finished, clicking the **OK** button will immediately add these subjects to new tags.

Each new subject entered in the **Quick Entry** window will be added as a new **650_a**.

Categories tab

This tab allows items to be grouped into custom categories specific to your location. Category groupings make it easier to access related items in a collection.



Any text that is added to the categories contained within this tab can be searched by library patrons when they are trying to locate a specific item in your collection.

Bibliography—Used to create bibliographies that might be of interest to library patrons. An item may belong to several different bibliographic categories. Bibliographic data is stored in MARC tag **653_a**.

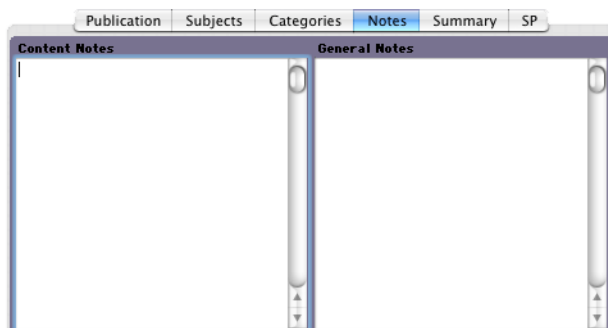
Curriculum—Contains curricula information for a title. For example, items that Ms. Andres is using in her Geography 212 class can include curriculum categories such as “Geography 212” and “Ms. Andres”. Curriculum Code data is saved in MARC tag **658_a**.

Interest Code—Contains information regarding the items’ intended audience. Be consistent in how you enter the values in this field (e.g. if you enter “8th grade” as an interest category, be sure the library patrons know that they would need to enter “8th grade” rather than “Eighth Grade”)¹. Interest level data is saved in MARC tag **521_a**².

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1. The interest code is not always so specific. Another example would be 7–10 (meaning age) or Junior High School to College Students.
 2. Depending on the MARC indicator, it can be more specific. 521 00_a could be reading level [3, 4]. 521 10_a could be interest age level [7–10]. 521 20_a could be interest grade level [K–3].

Notes tab

This tab contains content and general note fields.



Content Notes—Contains notes about the item's content. For example, the **Content Notes** for an anthology of poetry may list the poems included within the anthology.

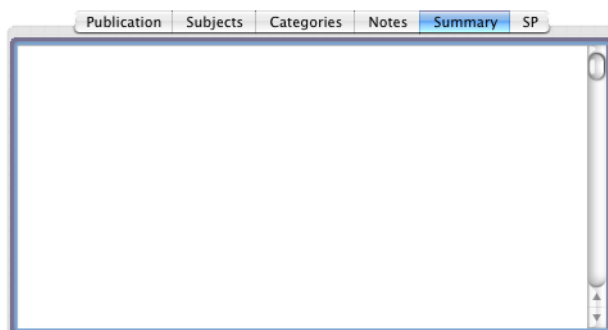
Separate contents by pressing the <return|enter> key. Only the first 505_a content note in the MARC record will be shown in this window.

General Notes—Contains the first **General Note** for this title.

Only the first 500_a note in the MARC record will be shown in this window.

Summary tab

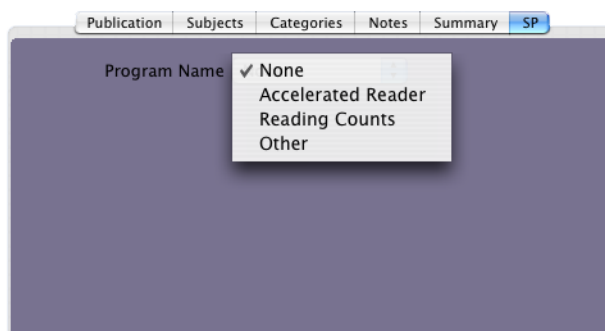
This tab contains a summary of the title and can be viewed for easy reference. If a library patron knows what a book (or any other item) is about, but do not know the title or author, they can search for the item by the words contained in this summary.



Only the first 520_a summary note in the MARC record will be shown in this window.

SP tab

The **SP** (Study Program) tab is used to record information for special programs such as **Accelerated Reader** and **Reading Counts**. For example, if you are using the **Accelerated Reader** program, select it from the drop-down menu and edit data for this entry. This data is stored in the **526** tag according to MARC standards for study programs. If you are using a study program other than **Accelerated Reader** or **Reading Counts**, you can create your own by selecting **Other** from the drop-down menu and filling in the study program name in the box provided.



The screenshot shows the 'SP' tab selected in a window with tabs for 'Publication', 'Subjects', 'Categories', 'Notes', 'Summary', and 'SP'. Below the tabs is a 'Program Name' label and a drop-down menu. The menu is open, showing four options: 'None' (with a checkmark), 'Accelerated Reader', 'Reading Counts', and 'Other'.

Program Name—Choose either a default study program or select **Other** to create a title for your own study program.

Interest Level or **Lexile**—This field can be used to represent the interest level for any number of study programs. If you need to express a range, you can do this with smaller numbers only and they must be separated by a hyphen. The maximum range would be entered as '1-15'.

Reading Level—This is the estimated reading level of the item (e.g. 3.4 would mean 4th month of the 3rd grade)

Point Count—Enter the Study Program point value here; in other words, the number of points received for passing a test on an item.

Test Number—Enter the Study Program test number here.

Holding Code—The institution using the Study Program (i.e. the Library Code).

Indexed—This checkbox allows you to indicate that you have the current test for this item and want this information to be searchable.

Local Information Window

When you decide to save a record from the **SmartMARC Results** window, the **Local Information** window will appear.

Enter your local record information into the **Barcode**, **Call Number**, **Library**, **Location**, **Cost**, **Copies**, **Funding Source**, and **Policy** fields. A separate **852** tag is created for each copy that is created. SmartMARC will automatically increment the barcode number for each additional copy. Enter “0” if you want to suppress creation of **852** tags

If you’ve set up your SmartMARC **Local Info** preferences, you won’t need to enter much information when this window appears (see “*Local Info*” on page 29).

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You may also use a scanner to scan barcode numbers.

When you are done entering local information, press <enter/return> on the keyboard or click on the **Save** button. The MARC record will be saved to the location you’ve specified in the **Single Search** preference window.

The **Search** window will then reappear with your initial search query intact, an entry will be added to the log, and the cursor will again be positioned in the **ISBN** field at the top of the **Search** window.

What Does SmartMARC Save?

SmartMARC saves your local information in the following tag locations:

- **Call Number** is saved at **852_h** (MARC Standard)
- **Barcode Number** is saved at **852_p** (MARC Standard)
- **Library** is saved at **852_a** (MARC Standard)
- **Location** is saved at **852_b** (MARC Standard)
- **Policy** is saved at **949_a** (Alexandria v3 Standard) and **986_a** (Alexandria v4 Standard) locations.
- **Cost** is saved at **852_9** (MARC Standard)
- **SmartMARC match source** is saved in **040**

The local information above will be saved in both MARC and MicroLIF records.

In the example below, notice the local information in the **852**, **949** and **986** tags.

```
LDR00409cam 2200205 i 4500^
008830502s1983 nyu 00011 eng^
010 _a83-8960^
020 _a038518400X^
040 _aCCSM5.00_cCCSM5.00^
082 _a813/.54_219^
10010_aAsimov, Isaac,_d1920-^
24514_aThe robots of dawn /_cIsaac Asimov.^
250 _a1st ed.^
2600_aGarden City, N.Y. :_bDoubleday,_c1983.^
300 _a419 p. ;_c22 cm.^
500 _aSequel: Robots and empire.^
650 0_aScience fiction.^
852 _aLibrary_hF Asi_p10432343^
949 _aSTD^
986 _aSTD^`
```


How does SmartMARC score records?

SmartMARC uses a very sophisticated system to grade MARC records. The full details of this system are a trade secret and will never be shared. However, the following information may help you understand just enough to get the best results possible in your never-ending quest for the perfect record.

- SmartMARC grades MARC records by assigning points for various conditions. Thus, the highest score means that SmartMARC thinks that the highest scoring record is the best possible match. The absolute number itself means nothing from record to record. Thus, a record matching at 100 may be just as good as one matching at 200. In addition, small changes in the scores may have great significance.
- If you uncheck the **Search for non-books** checkbox, SmartMARC will ignore records that it thinks are not books or MARC Language Materials. The leader position 6 (type of record) and 245_h (medium) fields are examined. An “a” in leader position 6 indicates a book, all others are considered non-books. A blank 245_h, or one containing the word “book,” is considered a book, all others are considered non-books.
- Two types of automatic matching errors can occur. A “False Positive” occurs when SmartMARC picks a record that it shouldn’t. A “False Negative” occurs when SmartMARC skips a record that it shouldn’t. SmartMARC is biased toward avoiding False Positive errors since they could result in changing your data from something correct (but brief) to something wrong (but complete).
- For matching purposes, SmartMARC examines the Title, Author, ISBN, LCCN, Publisher and Publication Year. In general, records with more matching fields get higher scores. Larger, more complete records, get higher scores.
- When matching fields, those that match exactly get higher scores than those that contain substrings or matching words. Thus, missing or misspelled words in your data will result in fewer matches.
- When either the initial or potential record is missing a match field, a test for that field is not performed. Thus, missing data has no impact on the score. This makes it possible for a record that doesn’t contain an ISBN to match against a record that does. Thus, only when fields in both the initial and potential records are found are they compared.
- More complete initial records will provide better matching results. Thus, a record that only contains an ISBN may match against the “wrong” record since SmartMARC has no way to differentiate between records that contain this ISBN.
- When records are automatically updated, the matching record is merged with your initial data, thus preserving any private tags you might have created. This may result in additional notes and subject fields that can be removed manually (if desired).

Our expert system is getting “smarter” every day. If you find results that are “strange,” send them to us (a copy of the source record, the database you used for matching and the results you obtained) and, if possible, we’ll teach SmartMARC to make better decisions.

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